**SKÅL INTERNATIONAL AUSTRALIA**

**FORWARD PLANNING**

**2014-2019**

*Modified from the Strategic Plan prepared by Bob Lunnon SIA VP 2001*

*Strategic Plan 2001 to 2005*

(Last edited 23 August 2014)

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EXECUTIVE SUMMARY

This Forward Planning document examines the history of Skål International Australia/SIA. It lays out the incredible progress SIA had in the late 1990’s and through to 2001 and our success over the past 13 years to mid-2014.

The overall goal of this SIA Forward Planning document is:

*To retain membership numbers, set a strategy for membership and Club development and growth; and position Skål as the trusted and respected voice in travel and tourism in Australia*

SIA strives to ensure members experience a professional, friendly and worthwhile environment “to network and discuss business among friends”

The statistics show that those States that increased their membership and Club numbers, e.g. Queensland and WA, have a larger share of total membership due to having a wider spread of clubs in each State, unlike Victoria and South Australia which rely on one Club to grow their membership

Australia’s highest membership was in 2001 when we reached 1375 members. Since then, membership has gradually declined and, as this Forward Planning document identifies, there are many reasons for this. None more than the fact times have changed and SKÅL needs to stay relevant and provide worthwhile benefits to our members

This Forward Planning document outlines the current situation and then makes recommendations for the SIA National Executive and Clubs to discuss and consider recommendations which have been split into two categories:

1. Actions (A): these are basically actions that can quickly be initiated and are mostly Best Practice
2. Long Term Recommendations (): these may require budgetary consideration and decision and may take longer to implement

The SIA Forward Planning document is a rolling 5 year plan. SIA will then prepare annual Business and Financial Plans, based on the revised Forward Planning document for each year

Clubs are not expected or required to create their own Forward Planning document.  Their annual Business and Financial Plans will "cascade down" from each annual/revised SIA Business and Financial Plan, based on the SIA revised Forward Planning document for each year

The SIA Forward Planning document details the process and timelines for each Club to develop their annual Business and Financial Plan

*Please refer to Pages 10-13 for the recommendations*

HISTORY OF THE ORGANISATION

Overview – Skål International Australia/SIA

SIA has been regarded as a leading light in the wider Skål International movement, as follows:

* 25 Clubs have been formed in 52 years, with the first Club founded in Sydney in 1960. 3 Clubs have since gone into suspension.
* Today we have a total of 22 Clubs, and have developed 5 new clubs over the past 12 years: Southern Gold Coast, Albany, Bunbury/Margaret River, Kununurra and Capricornia.
* Having Clubs spread through all States contributed to increasing membership, particularly when compared with other parts of the world, where Clubs and membership are in decline in many areas.
* SIA responded quickly to the requirements of the Skål International Operational Plan, requiring all Clubs to remove their membership ceilings. This contributed to the increase in overall membership.
* Sydney was the first Skål city to have 3 clubs.

Today Australia has 22 clubs in the following cities and towns:

Adelaide Albany

Brisbane Broome

Bunbury/Margaret River Cairns

Capricornia (Rockhampton) Canberra

Darwin Gold Coast

Hobart Kununurra

Launceston Melbourne

Perth Southern Gold Coast

Sunshine Coast Sydney City

Sydney North Sydney South

Townsville Whitsundays

Important history of Skål International Australia, the growth, the decline and today’s situation

Membership is the core of Skål International success

THE BREAKDOWN OF TOTAL MEMBERSHIP BY STATE AT 31 JULY 2014

When analysed by State, the following distribution of Clubs and members emerges:

|  |  |  |  |
| --- | --- | --- | --- |
| **STATE** | **CLUBS** | **TOTAL MEMBERS** | **PERCENTAGE** |
| ACT | 1 | 16 | 1.5% |
| NSW | 3 | 147 | 14% |
| NT | 1 | 50 | 4.7% |
| QLD | 8 | 363 | 34% |
| SA | 1 | 75 | 7% |
| TAS | 2 | 106 | 10% |
| VIC | 1 | 94 | 8.8% |
| WA | 5 | 214 | 20% |
| **TOTAL** | **22** | **165** | **100%** |

Distribution of clubs and members

The following is an analysis of Skål International Australia membership, by Club, 2001 to 31 July 2014.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **CLUB** | **MEMBERSHIP** | | | |
|  | **2001**  **31/12/2001** | **2012**  **31/12/2012** | **2013**  **31/12/2013** | **2014**  **31/07/2014** |
| ADELAIDE | 88 | 84 | 87 | **75** |
| ALBANY | N/A | 24 | 24 | **25** |
| ALICE SPRINGS | 35 | Suspended | N/A | N/A |
| BRISBANE | 88 | 84 | 85 | **79** |
| BROOME | 32 | 58 | 53 | **76** |
| BUNBURY/MARG RIVER | N/A | 15 | 15 | **16** |
| CAIRNS | 80 | 95 | 96 | **91** |
| CAPRICORNIA | N/A | 18 | 18 | **16** |
| CANBERRA | 37 | 21 | 23 | **16** |
| DARWIN | 46 | 41 | 44 | **50** |
| GOLD COAST | 85 | 88 | 88 | **48** |
| HOBART | 48 | 73 | 74 | **73** |
| ILLAWARRA | Suspended | N/A | N/A | N/A |
| KUNUNURRA | 29 | 26 | 24 | **22** |
| LAUNCESTON | 39 | 36 | 37 | **33** |
| MELBOURNE | 157 | 91 | 94 | **94** |
| NEWCASTLE | 27 | Suspended | N/A | N/A |
| PERTH | 80 | 77 | 78 | **75** |
| SOUTHERN GOLD COAST  SUNSHINE COAST | N/A  47 | N/A  47 | N/A  47 | **35**  **37** |
| SYDNEY CITY | 286 | 122 | 124 | **84** |
| SYDNEY NORTH | 65 | 52 | 52 | **49** |
| SYDNEY SOUTH | 41 | 18 | 18 | **14** |
| TOWNSVILLE | 26 | 42 | 39 | **36** |
| WHITSUNDAYS | 20 | 21 | 21 | **21** |
|  |  |  |  |  |
| **TOTAL** | **1375** | **1133** | **1141** | **1065** |

Over 13 years

* A decline in membership, particularly since 2009
* The peak was in 2001 with 1375 members
* There has been an overall decline of 310 to 31 July 2014
* Our biggest cities generally reflect the greatest decline
* Net loss of 68 members since December 2012, and 76 since December 2013
* Some regional areas have increased membership, particularly WA and NT

**Comment:**

* City Clubs have difficulty in retaining and attracting new members due to competition with other tourism bodies and associations, and less-costly competitor luncheon clubs and groups
* Perception is that SKÅL is a drinking club
* Working and industry environment is different to 13 years ago
* Many of the most loyal SKÅLLEAGUES have retired or passed on
* Clubs in regional and tourist areas, where tourism is the major industry, have increased membership as competitor tourism bodies are not represented

CURRENT SITUATION

OPERATIONS OF SKÅL INTERNATIONAL AUSTRALIA - NATIONAL

Attendance at National Assemblies/AGMs

* The current system of funding to incentivise attendance at National Meetings is based on all Clubs being subsidised to attend, to the value of one discounted Economy Class airfare, and attendance at the dinner for Club voting delegate/s attending meetings.
* 13 years ago it was argued this system and use of the national budget was not in the best interests of the Clubs and membership, due to cross-subsidisation of Clubs.
* The travel subsidy has been the key factor in a 100% Club attendance at the past 18 SIA National Assemblies/AGMs.
* It is recognised that some smaller Clubs would not attend if the travel subsidy was not in place, and that larger Clubs may also not attend regularly. It is also seen as assistance as well as thanks for the time and effort put in by the Club Presidents/Committee members.
* It needs to be recognised that there is no financial assistance to attend World Congresses. Through the mentoring and meeting at National Assembly level we are able to enthuse Clubs to budget for their attendance at World Congresses at their own expense. This, Australia has enjoyed exceptional attendance at World Congresses consistently since 2005.

Location and format of National Assemblies/AGMs:

* Due to the cost of holding National Assemblies/AGMs it has been suggested meetings be held in major cities where the majority of Clubs are located.
* It has been argued that this could reduce travel costs for the majority of Clubs through more competitive airfares to major cities. This would assist in keeping meeting costs to a minimum.
* It was recommended that meeting locations be selected on the basis of ease and cost of access including length of travel time required, to ensure time away is kept to a minimum.
* The reality, however is that:
  + At each National Assembly/AGM the primary objective is to meet, develop and decide on strategies for the betterment of SKÅL in Australia.
  + Our meetings need to allow time for development of SKÅL in Australia, management issues to be resolved, and improvement in professional services to Clubs and members, as per the SKÅL International Operational Plan.
  + Each National Assembly/AGM also has an excellent networking and ideas format, while providing the opportunity through the Tourism Forum to promote local tourism achievements of significance.

SIA National Capitation Fees

* The Statutes for SIA in Article XV, paragraph 2, require that “the amount of annual subscription shall be agreed by the National Committee at an Annual General Meeting held at least 12 months prior to the subscription falling due”.
* This would require Capitation Fees for 2014 to have been approved at the Annual General Meeting in Cairns in March 2012, for example. As this is not practical the SIA National Committee agreed to approve Capitation Fees at the AGM 9 months prior to the commencement of the applicable period.
* Ensure SIA Capitation Fees are minimised, and member benefits maximised, wherever possible

Club Business and Financial Plans

* As agreed at the National Assembly in Cairns in 2012, Clubs are to prepare an annual Business and Financial Plan for submission to the National Executive for review in advance of each SKÅL year.
* The Business and Financial Plan should address:
  + Situation analysis, including current membership
  + New membership development plans and activities
  + Public and media relations strategies and activities
  + Finance plan including income and expenditure
  + Goals, objectives and succession planning
  + New Club development plans and activities
* This will allow the National Executive to review each Club’s Business and Financial Plan and provide advice on alternatives and options. Club budgets should include for the following year their travel subsidies and National/International capitation fees.
* From 2013 onwards, each Club’s Business and Financial Plan would be requested in August for completion and submission by 31 October for review by the National Executive.

Operations at Skål international Australia - Clubs

* Since 2001 3 Clubs (Alice Springs, Illawarra & Newcastle) have gone into suspension, with 5 new Clubs formed: Southern Gold Coast (2014), Albany (2006), Bunbury/Margaret River (2002), Capricornia (2004) and Kununurra (2001)
* Queensland and Western Australia have been successful in expanding the number of Clubs in their State. The figures of distribution of members by State, when compared with distribution of general population, would indicate that NSW and Victoria are behind the national average and there may be an opportunity in these States for Club and membership development and growth

Opportunities for Expansion of New Clubs

Recommendations for consideration and possible implementation

*(Please note these are only recommendations and require further discussion, as there are many difficulties in setting up new Clubs, which include, but are not limited to, being able to attract membership from restaurants, golf and other sporting clubs, spas etc, as well as having a committed SKALleague, or SKALleagues, in each area to lead this initiative)*

**New South Wales**

**Primary**: Possible reinstatement of Newcastle and Illawarra, Port Stephens

Coffs Harbour, Port Macquarie, Gosford/Central Coast, Blue Mountains

**Secondary**: Hunter Valley, Dubbo

**Northern Territory**

**Primary**: Possible reinstatement of Alice Springs

**Secondary**: Katherine

**Queensland**

**Primary**: Mackay, Outback Queensland, Port Douglas, Noosa, Granite Belt

**Secondary**: Mt Isa

**South Australia**

**Primary**: Port Augusta, Port Lincoln, Fleurieu Peninsula, Barossa Valley

**Secondary**: Whyalla, Glenelg, Mt Gambier, Kangaroo Island

**Victoria**

**Primary**: Bendigo, Ballarat, Albury/Wodonga, Geelong, Mornington Peninsula

**Secondary**: Bairnsdale, Victorian High Country, Great Ocean Road

**Western Australia**

**Primary**: Geraldton

**Secondary**: Kalgoorlie

CLUB MEMBER RETENTION AND GROWTH

Why are we not succeeding?

* The major opportunity for growth is in the capital cities of Melbourne, Sydney, Perth, Adelaide, Brisbane and Darwin. Most of these cities have seen major decline or nil growth over the past decade.
* Why does Skål have an issue in retaining and recruiting new members? This issue is at the very core of the viability and future of a vibrant Skål. Some of the reasons are as follows:
  + City locations find it difficult to retain and attract new members due to competition with other tourism bodies and associations, and less-costly competitor luncheon clubs (no capitation fees)
  + Past perception of Skål being a drinking club
  + Working and industry environment is different to 13 years ago. It is now a more competitive environment and people have become increasingly time poor
  + Many of the more loyal SKALleagues have retired or passed on
  + Skål has been perceived as being for older and retired people whereas we need to increase membership from younger and active travel industry managers
  + Skål Clubs no longer have all the major travel and tourism companies as members
  + Companies do not want their staff at Skål meetings unless there is a business value through networking with major clients/partners, and not their direct competitors
  + Skål in Australia is no longer recognised as a serious industry body: relevance
  + Regional areas struggle for membership for all the same reasons. However, regional and tourist areas have increased membership as other tourism bodies and associations are not represented, as distinct from city clubs. Tourism is the major industry in many locations and SKAL creates an opportunity for networking and discussing regional/local issues and strategies

Now is the time to turn these negatives into opportunities and create some goals

RECOMMENDATIONS () & RECOMMENDED ACTIONS (A)

Skål in Australia is at the crossroads, and this Forward Planning document for 2014-2019 has been developed as a strategy to place SIA, Clubs and members in a position to move forward, as follows:

* The very core of Skål is the distribution of its membership base. It provides Skål with purpose, opportunity, future and viability.

All the recommendations that follow have one purpose and that is to the membership, whether it pertains to:

* a quality experience as a Skål member
* a professional opportunity to do business or
* to network with new and existing business acquaintances

At National Level

To ensure this work is done, the SIA Executive have been allocated specific responsibilities in order to create stable and experienced leadership, and succession planning, thus keeping the strategy alive

* Increase efficiencies at Club and National levels by updating our management and operations practices
* Improving the financial viability and membership numbers of Clubs
* Working closely with Clubs to ensure financial viability
* Retain membership numbers to provide a strong base for growth
* National funds be utilised to benefit Membership Development, Tourism Forums and Administration and Communications
* Growing by spreading Skål ideals through new Club development, and the industry at large

RECOMMENDED ACTIONS

**A Action**

To retain membership numbers and set a strategy for growth

The member’s experience is with their local Club and this is where we need to focus our membership retention and development strategies. Clubs need to be able to operate to the professional level that Skål is seeking, and to accomplish this the recommendations are:

* It will be mandatory from 2013/2014 for each Club to have in place:

1. Business Plan, and
2. Financial Plan

SIA National Executive will provide a Business and Financial Plan template for this purpose, along with a sample Business and Financial Plan as a guide for completion.

Some Clubs already have a Business Plan which they are willing to share. This will be a work in progress for each Club and reviewed annually by the National Executive.

Business and Financial Plans should be in place in advance of each year, for implementation by each new committee, to improve continuity and succession planning.

Timeline is as follows:

* SIA - request in August each year
* Clubs - submit to SIA for review by 31 October
* Clubs - implementation in February/March by each new Committee

The rationale of this action is that it creates continuity and a handover as the basis of each Club’s Business and Financial Plan.

It also allows for succession planning as well as ongoing mentoring of new Committee members by previous Committee members.

* Position Descriptions for each committee position to be refined and put in place for each Club in Australia, outlining roles and responsibilities at local, National and International levels. NB: they are included in the Club Statutes for President, Vice President, Secretary and Treasurer
* Succession planning is essential and we are asking our Clubs to be more accountable and professional at all levels
* All members should receive a welcome and congratulations letter outlining benefits and who to contact in their Club should they need assistance. A sample will be put on the SIA website

A Skål information kit will be issued with this welcome letter including a list of what is available on the website and how to access it

* Sharing of ideas program. Many Clubs have the same issues and, while some are struggling with the solution, other Clubs may have a resolution. A “Club Ideas Corner” on the SIA site is a place to post good ideas and for other Clubs and their Committees to look for solutions

This would assist in holding good quality meetings. Some Clubs have great ideas that could be used in other Clubs

* It is recommended the Skål Signature be used where possible by Skålleagues, however it is recognised that individual company policy may preclude this for some members.

RECOMMENDATIONS

** Recommendation**

The following items are recommendations for discussion

Skål globally needs to change. The only area we can make real change with this Forward Planning document is in Australia. If successful, hopefully we can continue to lead by example

* An informal mentoring program be created, and a formal mentoring program be investigated and implemented where possible. This will require the collation of a list of experienced industry people who are willing to mentor when a question arises. This may be a wise old head, or a successful younger person, who are willing to assist with the mentoring process

This would be a web-based program where email addresses are provided of those willing to mentor

* SIA needs to develop stronger industry links to overcome past perceptions of being an ageing and drinking organisation.

No other Industry Association has domestic reach with branches/Clubs throughout regional Australia, or international reach with branches/Clubs in markets where our members do business and need networking support

To use this to our advantage we need to develop strong relationships with International, National, State and Regional tourism organisations and associations, which also provides Club membership opportunities

This will also allow Skål to engage in business forums and bring an added benefit to members seeking new business opportunities, domestically and internationally

* SIA needs to review their communications on many levels. We need to explore and move with the new distribution channels, explore and work with current membership categories, how Digital Marketing fits, with regular newsletters to all members, and a view to widening the recruitment net

This would also work using inexpensive systems such as “Mail Chimp” to email potential new members and “Survey Monkey” to review our progress with members

* Club Committees now have a Membership Officer, however a recommendation is that we have 2 people in charge of membership

1. Membership (basically looking after retention)
2. Membership Growth (new membership)

After all, membership is the core of the organisation

*This needs further discussion, as smaller Clubs could have difficulty finding extra Committee members*

* Introduce a jobs section on the Club’s website. We need to ensure we do not jeopardise any member’s business. This could be seen as a good member’s benefit for employers and employee members
* Encourage members to better utilise the Developing a Directory of Member Services and Benefits on the website
* A New Club Formation Plan to be established by Clubs to assist with establishing new Clubs, with an action plan in place and reporting back to the National Executive, including a time line for the opening of each Club. This would be evaluated for approval by the National Executive for access to Membership Development funds
* Creating a Skål International Australia National Office - Administration & Communications, to assist the National Executive, Clubs, and members, to include Public Relations and Communications

The reality is that the higher expectations we have of Skål in Australia, there is more work for those good enough to offer their services. If we are successful in recruiting industry professionals and consequently developing a healthy succession rotation program for high profile roles, there is an argument that we should not burden them with administrative and time consuming roles

For example, the current system relies on SIA and Club Executive positions to be held by volunteers. It also includes these roles receiving and administering calls, forms, and emails

SIA can resolve this through a professional Skål International Australia National Office - Administration & Communications. This office could:

* Provide an accounting system, assistance with legal and taxation issues, and Club and member services
* Provide support to the National Executive on a day-to-day basis, as well as providing a professional service to Clubs requiring assistance with Club and membership development and growth
* Work with SKÅL members planning to attend World Congresses and National Assemblies/AGMs
* Public Relations and Communications. SKÅL in Australia needs awareness and image improvement which emanates from a professional approach through this office
* Represent SIA at trade events and industry meetings
* General communications, emails, membership queries etc.

This proposal for a Skål International Australia National Office - Administration & Communications is in accordance with the SKÅL International Operational Plan which recommends that Clubs implement paid, professional administration assistance.

**OUR GOAL**

**TO RETAIN MEMBERSHIP NUMBERS, SET A STRATEGY FOR MEMBERSHIP AND CLUB DEVELOPMENT AND GROWTH; AND POSITION SKÅL AS THE TRUSTED AND RESPECTED VOICE IN TRAVEL AND TOURISM IN AUSTRALIA**