

Netball New Zealand 2011 Preview



Highlights of 2010

- Commonwealth Games



NETBALL NEW ZEALAND
Pūoro Whānui Aotearoa

Highlights of 2010



GA	GS	C	GK	WD	GD	WA	GA	GS	C	GK	WD	GD
WD	GD	WA	GA	GS	C	GK	WD	GD	WA	GA	GS	C



NETBALL NEW ZEALAND
Pūoro māori āwhenua

Highlights of 2010

- Silver Ferns
 - Gold Medal Commonwealth Games
 - Awarded Lonsdale Cup
 - Nominated for Halberg Awards
 - Team of the Year
 - Casey Williams – Sportswomen of the Year
 - Chosen in top 8 Sports Moments of 2010
 - Should have been Coach of the Year!!!!



Highlights of 2010

- FastNet Ferns
 - Great result
 - Combination of youth and experience
- Constellation Cup Launch



Netball and SPARC

- High Performance
 - Targeted sport -World Championships Focus
 - Increased funding
- Community Sport Focus
 - Targeted Sport
 - “More kids and adults in sport”
 - KiwiSport
 - Regional Sport Trust (RST) Alignment



ANZ Championship

- Year 4 – would we get here????
- Early start – World Netball Champs
- Re-signed ANZ for 3 years
- Re-signed Sky TV for 3 years
- Curtain raisers – College Netball
- On Court Promo show
- NZ Team to win ANZ



NNZ Broadcast Partner

- Sky Sport and Prime TV
 - 4 year deal
 - Largest commercial deal in NNZ history
 - Sky Sport for all live games
 - Prime TV with delayed coverage
 - Product innovation
- TVNZ could not match commercial offer or broadcast scheduling flexibility
- Announced early next week





NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

Netball Delivery Review



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

NNZ Strategic Plan

Mission (why we exist)

- To lead the sustainable growth of Netball and its people

Vision (what we aspire to)

- New Zealand's leading sport by 2020



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

NNZ Strategic Plan

Challenge 8 Netball Delivery Model

“To investigate whether or not the current governance, delivery and engagement model still meets the needs of the evolving landscape at all levels of the game in New Zealand”



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

Why do we need this review?

- The landscape has changed
- Our current structure has served Netball well over the last 10 years
- Re-evaluation is positive
- Is the structure future proofed?



Why do we need this review?

- There has been significant competition evolution
 - ANZ Championship launch
 - International Calendar
 - Launch of FastNet
 - Movement to playing indoors
 - Lois Muir challenge, National Championships, Secondary Schools
 - Private Providers



Why do we need this review?

- Commercialisation of sport
 - Sponsorship
 - Growth of professionalism & expectations
- Trust funding
 - Sinking lid policy
 - Downwards trend
- SPARC & RST structures
- Trend towards more centralised leadership
- Increased numbers of governance structures



Why do we need this review?

- Participation dynamics
 - Demands on Volunteers, Officials, Umpires & coaches have increased
 - Increased choice for participants & spectator base
 - Trend for Wellness



NNZ undertook a 3 stage process

- Completed an Organisation Development Tool (ODT) on the netball community - **fact**
- Completed a Stakeholder Survey - **opinion**
- Completed a Regional Roadshow – **sense check**



ORGANISATIONAL DEVELOPMENT TOOL (ODT)



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

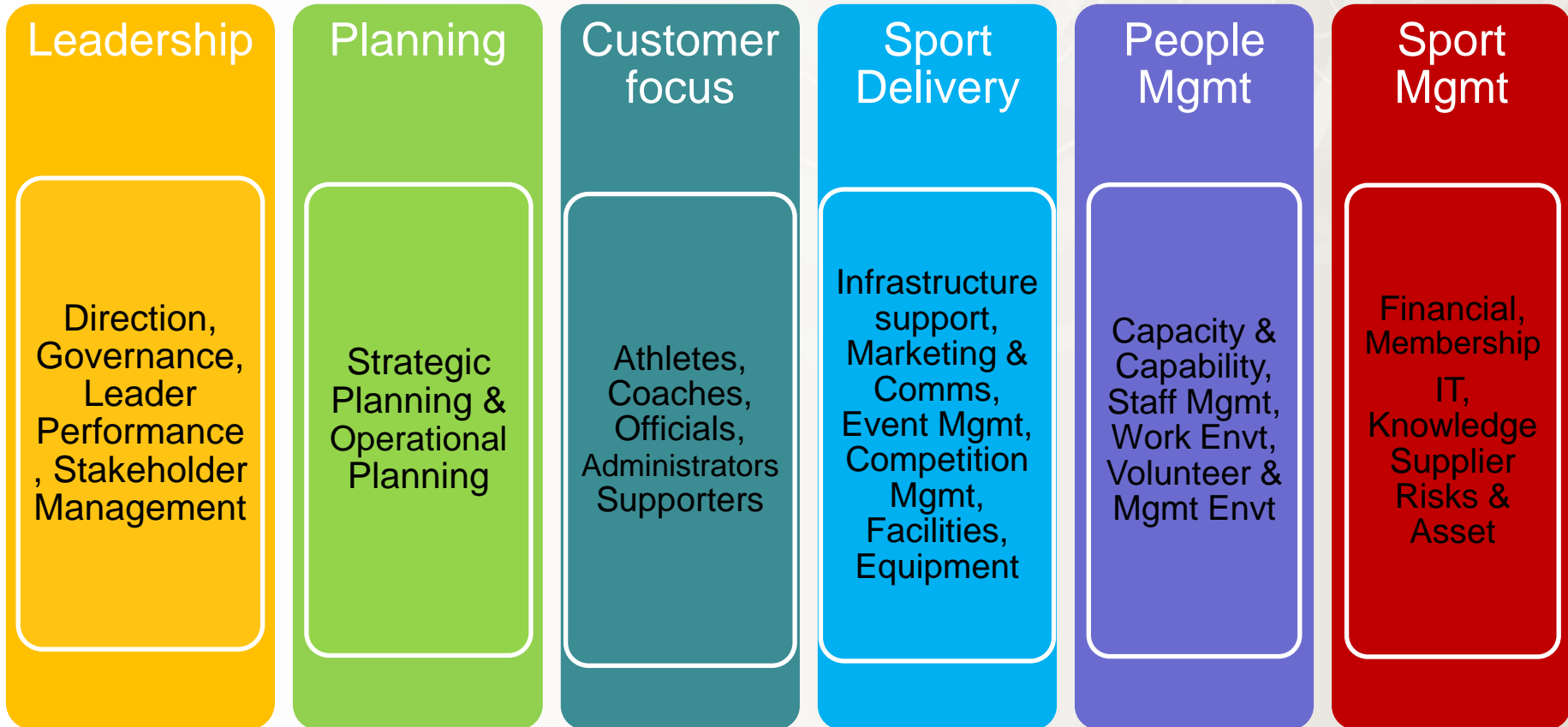
Organisational Development Tool

- SPARC designed tool
- Assessments on
 - NNZ,
 - 12 Regions,
 - 5 franchises
 - 28 centres
- Assessments conducted by consultants and RST nominees



Organisational Development Tool

■ Six modules of ODT



STAKEHOLDER SURVEY



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

Stakeholder Survey

- To understand more about
 - stakeholders experiences
 - measure performance in meeting stakeholder needs & expectations
- Regions & Franchises feedback on NNZ
- Centres feedback on NNZ & Regions



REGIONAL VISITS



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

Regional Visits

- CEO & elected NNZ Board members attended 1-2hr discussion session in each region
- Questions discussed at each session:
 - What is working well with you?
 - What is working well with your engagement with your Region/NNZ?
 - What's not working so well?
 - What additional support do you need?
 - What do you think of ANZ Championship?



Regional Visits

- Key themes noted:
 - Regional structures, systems and relationships are mainly positive
 - Communication, communication, communication
 - Player numbers are mostly in an upward trend across the country
 - Additional support in Coaching and Umpiring would make the biggest difference
 - Times are tough financially



Regional Visits

- Regions and Centres require additional support with Facility Management
- Additional opportunities like Summer League, Mixed and FastNet are not maximised in many areas
- ANZ Championship has strong support as a competition but there is concern about funding



FINANCIAL REVIEW



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

Financial Review – Netball in NZ

- Revenue generated by the netball community since 2007 has increased due to:
 - Introduction of ANZ Championship
 - Increased sponsorship revenue & alternative income sources
 - Offset by decrease in trust funding across NNZ & Regions



Financial Review - NNZ

- NNZ revenue has grown on the back of increased commercialisation of the sport
- Sponsorship has grown by 40% since 2007 however this growth has levelled off
- Trust funding revenue has declined
- Reliance on trust funding is below NSO average



Other financial areas to consider

- Netball New Zealand has struggled to maintain a break even position
- Deficits have been incurred in 2 of last 5 years
- Growth in reserves has not occurred
- NNZ has used reserves to:
 - Invest working capital in ANZ Championship
 - Loans to some ANZC franchises
 - Loans to some Regions



Financial Review - Regions

- Affiliation fees provide 20-25% of regional revenue
- The single largest source of income for regions is Trust funding
- Reliance on 'at risk' revenue is of concern



Financial Review - Regions

- The ability for a region to take a long term view of financial stability is limited by the investment cycles of funders
- Franchises are increasingly drawing on regional support (both financial & resources)



Financial Review - Centres

- Generally have an asset base (courts, pavilions)
- Utilise resources to generate alternate forms of income
- Less reliance on 'at risk' funding



Financial Review - Centres

- Direct value relationship with participants & affiliation fees
- Reliance on Volunteers
- Increased 'pay for play' expectations
- Historically centres have consolidated to address financial or participation issues
- No centre has required financial support from NNZ



ANZ Championship

- Delivered both positive & negative impacts on the wider netball community
- Positive
 - Increased netball related revenue
 - Provided employment opportunities
 - Increased commercialisation, profile & exposure of Netball
 - Good Telly!



ANZ Championship

- Positive
 - Opportunities for volunteers, officials to gain experience
 - Creation of 'new roles' within Netball eg statisticians
 - Creation of a semi-professional environment for participants (coaches, players, umpires etc)
 - Increased interaction with Australian Netball



ANZ Championship

- Negative Impacts
 - Financial responsibility of stakeholders (regions, centres & NNZ)
 - Put pressure on the resources of regions & centres (volunteers etc)
 - Increased costs of professionalism across players, umpires etc



ANZ Championship

- Negative Impacts (cont)
 - Changing expectations at lower levels of the game
 - Increased competition for the commercial dollar (ANZC, 5 NZ franchises, NNZ, Regions & Centres)



IN SUMMARY



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa

In summary

- ODT results suggest strong systems & processes across the netball community
- Stakeholder survey suggests the netball community is in good heart
- Regional visits supported these findings
- However There are significant financial challenges



In summary

- Trust funding is decreasing and this trend will continue
- NNZ commercial opportunities are near saturation
- Long term financial view for Regions is challenging
- Reserves at risk across NNZ, Regions & Franchises

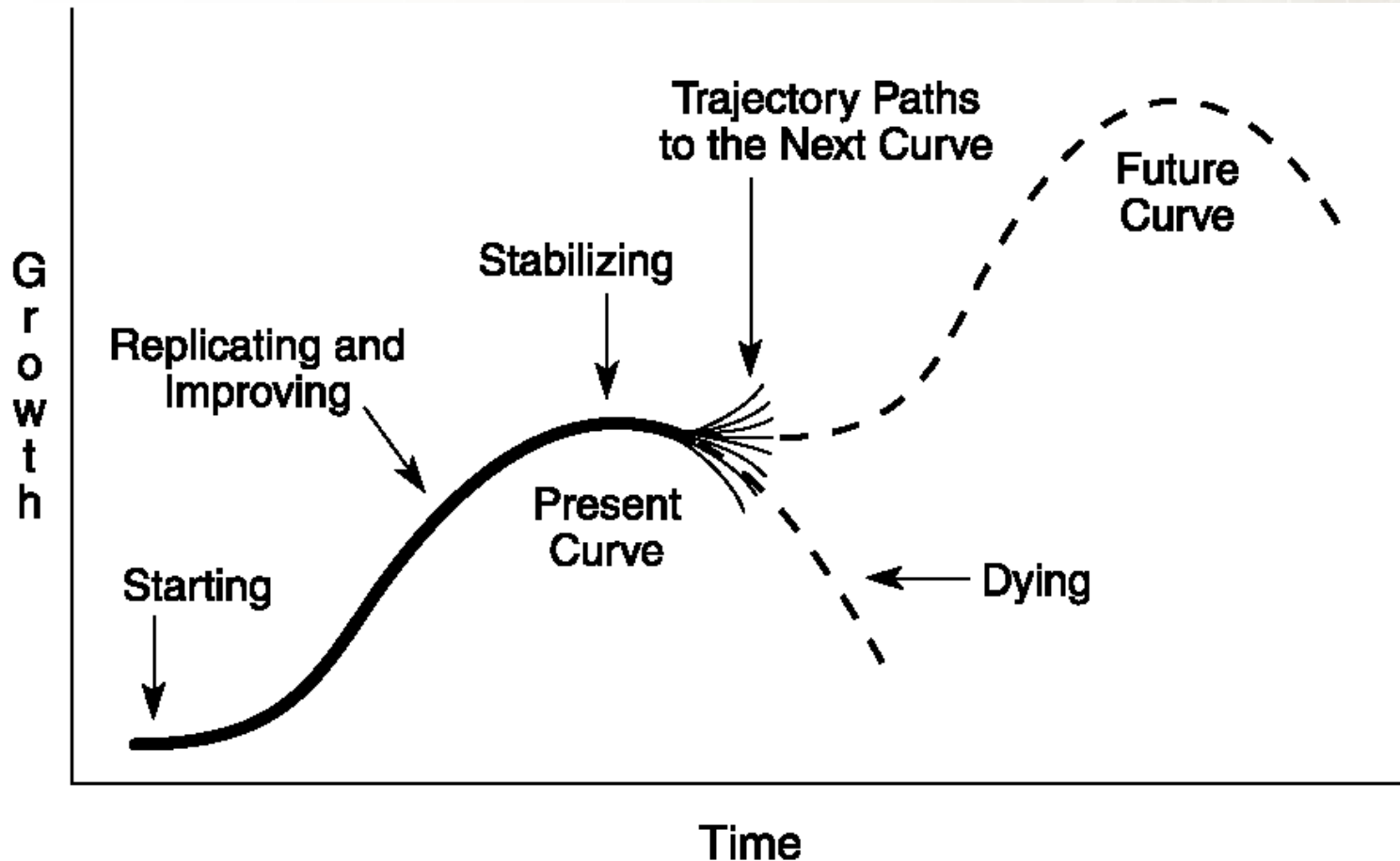


In summary

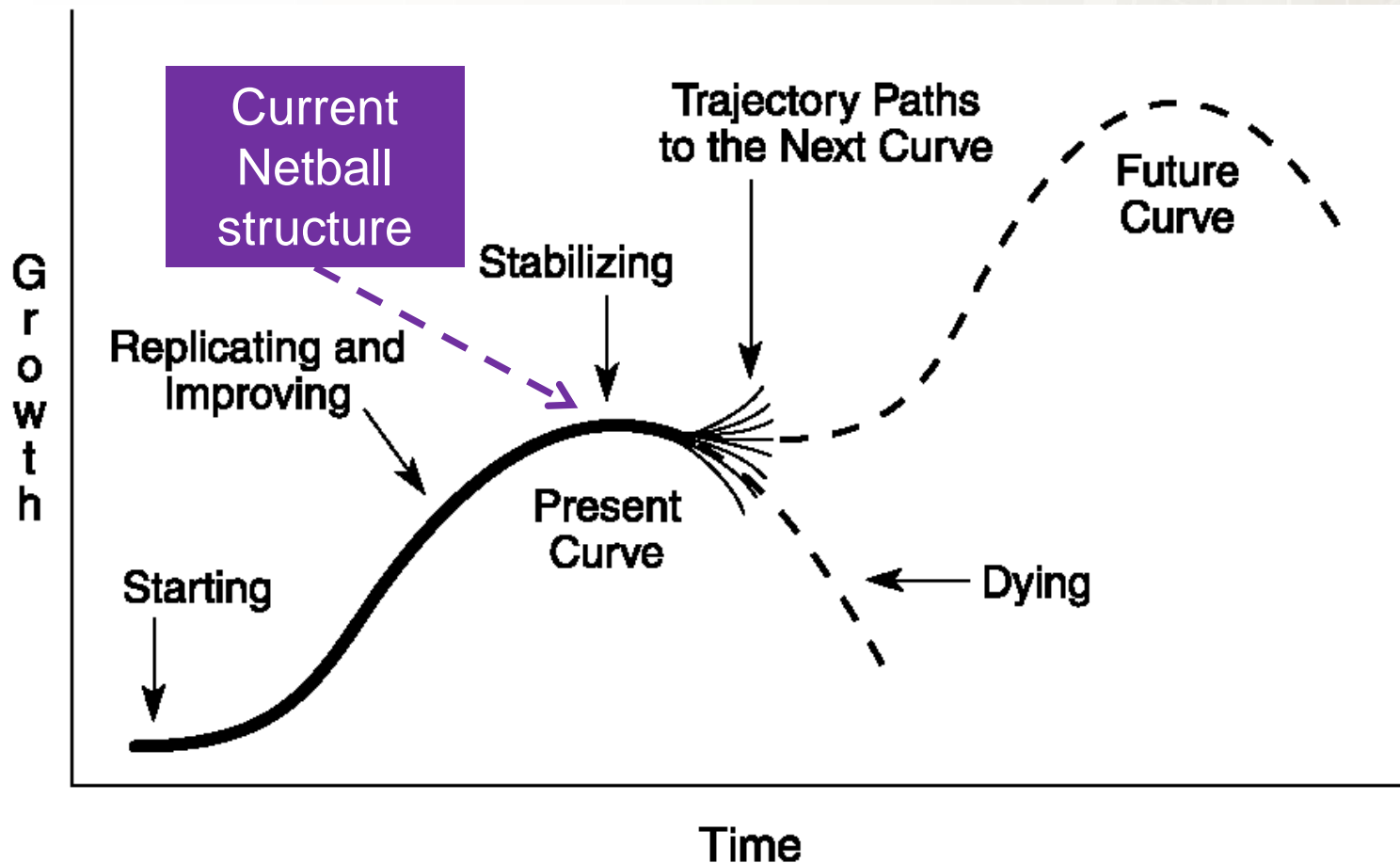
- We are not broken, but
 - We are at a tipping point
 - Goal of sustainability requires people, process, and capability improvement across NNZ, Regions, Franchises & Centres
 - Does the current model allow us to deliver on our mission to lead the sustainable growth of netball and its people from a financial perspective?



The 'S' (sigmoid) curve



The 'S' (sigmoid) curve



PART II



NETBALL NEW ZEALAND
Pōitarawhiti Aotearoa

NNZ Review

- ODT, Stakeholder survey, Regional visits & financial information considered by NNZ Senior Management Team & NNZ Board
- One day facilitated workshop
- Consultation with Organisational structure experts, SPARC, Surf lifesaving, Rugby League *(who have recently reviewed their structure)*
- NNZ Board has developed three options as a **start point** for discussion



Netball Delivery Review

- These discussions gave consideration against the criteria below
 - Financial/Commercial
 - Participation
 - Stakeholder impact
 - Quality of service delivery
 - Alignment
 - Longevity
- There is no predetermined outcome



Regional Representative Meeting

- Three structural options were proposed
- SWOT analysis performed by Regional Representatives
- General discussion and SWOT analysis indicated support for elements of each option but further detail required
- General consensus that financial sustainability was key concern
- Core Consultation group members nominated by Regional representatives



Core Consultation Group

- Sheryl Dawson – BOP and Magic CEO. NNZ Life Member
- David Ronaldson – Counties Manukau Chair
- Ann Hay – NWR Chair
- Nicki Paterson – Otago Regional Manager
- Mark Cameron – Mystics CEO
- Julie Paterson – Southland and Steel CEO
- Chris Rodda – Christchurch Netball Centre Vice President
- Dianne Lasenby – Auckland Netball Centre General Manager
- Judy McDonald – Whangarei Netball Centre President
- Debbie Longhurst – Netball Taranaki General Manager
- Naomi Whitewood – Eastern Chair



Core Consultation Group

NNZ

- Raelene Castle – NNZ CEO
- Raewyn Lovett - NNZ Chair
- Karen Brown – NNZ Board Member
- Shirley Hooper – NNZ Board Member
- Carole Maddix – NNZ Board Member
- Lois Muir - NNZ President Current
- Sheryl Wells – NNZ President Elect
- Jennie Wylie – NNZ Finance Director
- Kate Agnew – NNZ Operations Director



Progress of Options

- Presentation of initial “Netball Delivery Review” held with Regional representatives 30th September
- NNZ Board representatives and NNZ workshop
 - NNZ Board reviewed the models presented in light of the Regional feedback
 - Reassessment of initial models against key principles
 - Assessment of SWOT analysis received at Netball Delivery Review workshop
 - Review and enhancement of proposed models
 - Analysis of models against key principles
 - Development of additional considerations



Additional Considerations

Financial & Commercial	Participation
Stakeholder Impact	Quality of Service Delivery
Alignment	Longevity
Governance structures	Policies & Procedures
Location/Boundaries	Tribal Loyalty
Strategic Partners ie RST's/Council/Funders	HP Pathways/Talent ID for Players, Coaches, Umpires & officials
Facilities	Pay for Play
Life Membership	Existing programmes



Financial Modelling Process

- An independent consultant was engaged under direction of NNZ to model the 3 options under review
- Source data from Regions, Centres and NNZ were utilised, estimates of Franchise data was made
- Historical trends were analysed and projections made based on these



Principals of the Netball Delivery Review

Long term financial & Commercial Sustainability of the sport

Increasing & Retaining participation at all levels of the sport

Delivering pathways for Players, Coaches, Umpires, Officials
& Volunteers

Continually striving to improve the quality of netball
experiences

Respected connections within the netball community
aligned to common goals & values



NETBALL NEW ZEALAND
Poitaraawhiti Aotearoa

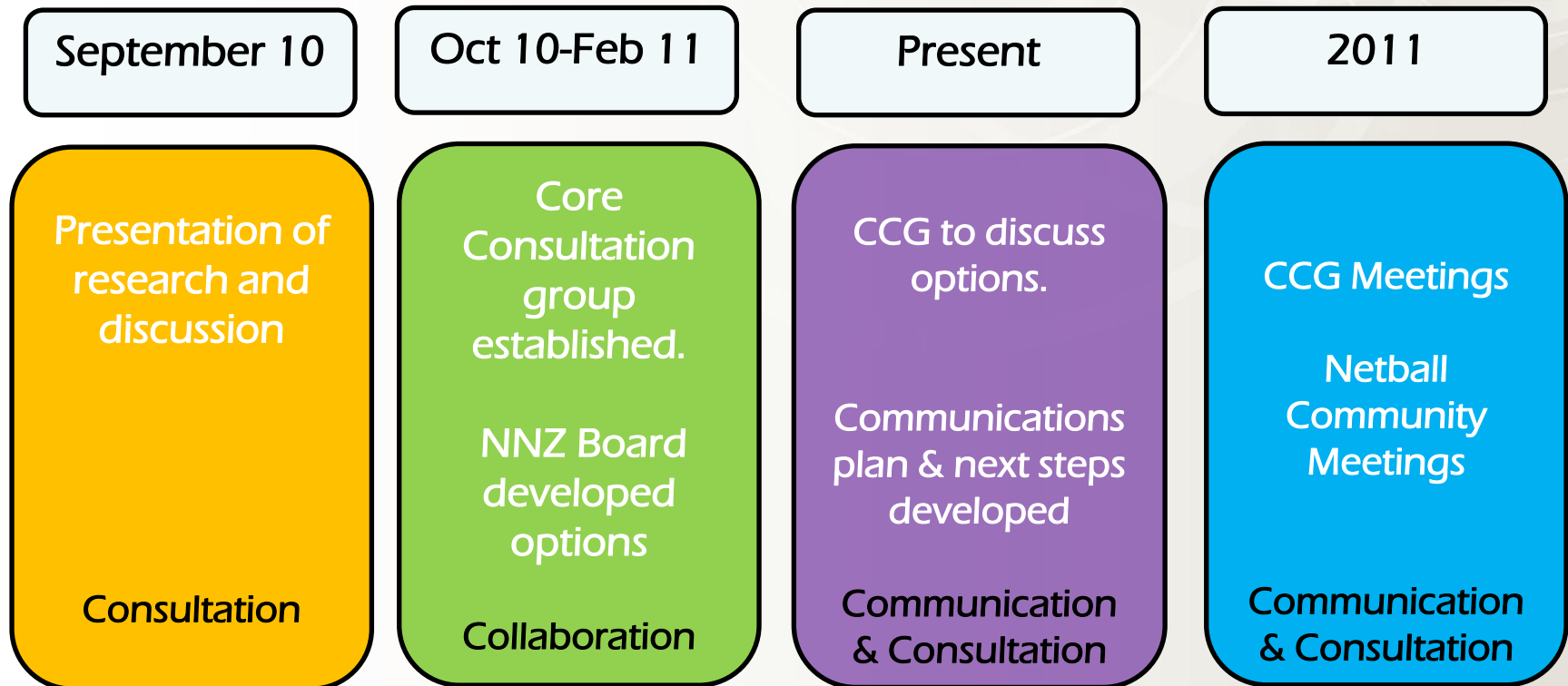
CCG Meeting

- First meeting of the wider group
- Wide range of views and experiences
- Current Structure used as a baseline
- 2 structure variations discussed compared with principals and financials

- Common ground was found to move process to the next stage



Progress and Next Steps



Next Steps

- CCG to meet and further discuss and debate options
- Communication with wider Netball Community
- NZ Roadshow in late 2011 to present options
- Recommendation brought to 2012 AGM
- Transition during 2012



Questions



NETBALL NEW ZEALAND
Poitarawhiti Aotearoa