

McLAUGHLIN SPORTS CONSULTANCY - YOUR NEEDS: OUR FOCUS!



BOWLS ACT

Fit for Future Purpose Clubs Project
Preliminary Findings and Opportunities Paper



29th April 2022

Contents

Section 1: Introduction	Page 3
Section 2: Document Review Findings Summary	Page 8
Section 3: Clubs Survey Findings Summary	Page 60
Section 4: Stakeholder Interviews Findings Summary	Page 73
Section 5: Clubs Focus Group Session Findings Summary	Page 79
Section 6: Preliminary Opportunities	Page 85
Section 7: Next Steps	Page 93
Appendix A: Interview and Focus Session Participants	Page 94

Section 1: Introduction

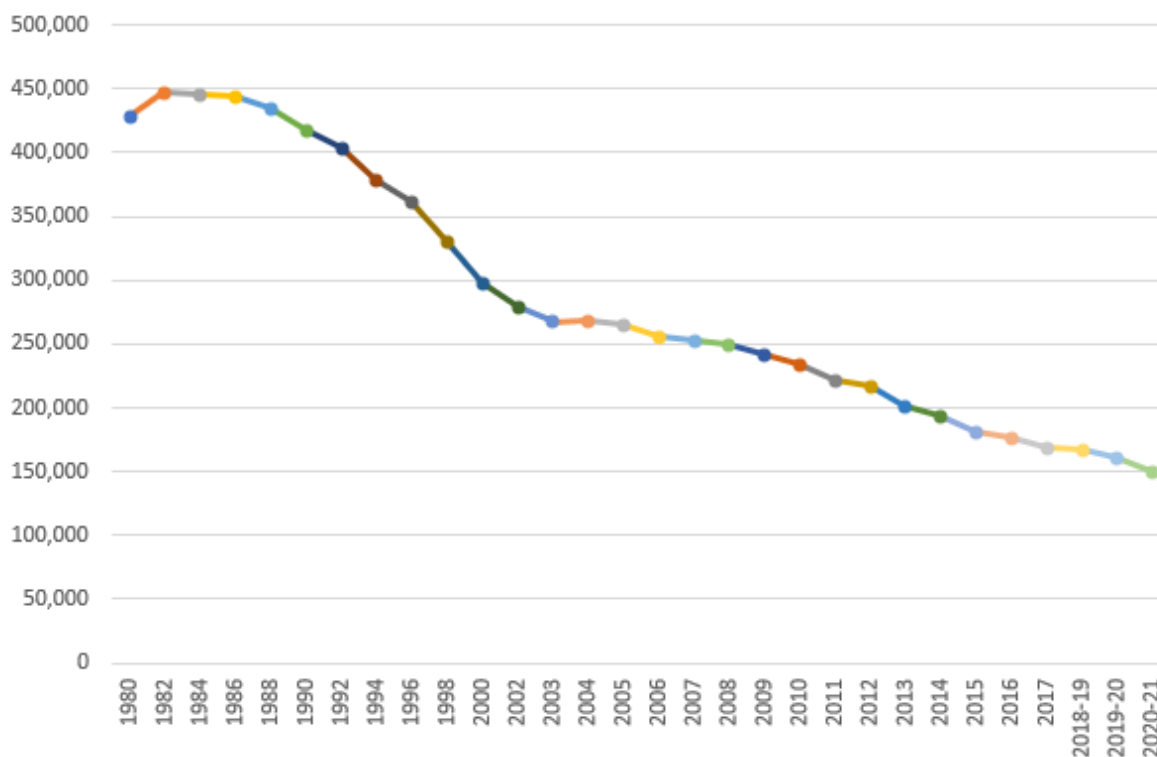
About the Fit-4-Future Purpose Clubs Project

Why?

To support Bowls ACT affiliated clubs to implement operating models which are fit for future purpose, to enable a sustainable and vibrant future for Bowls in the ACT.

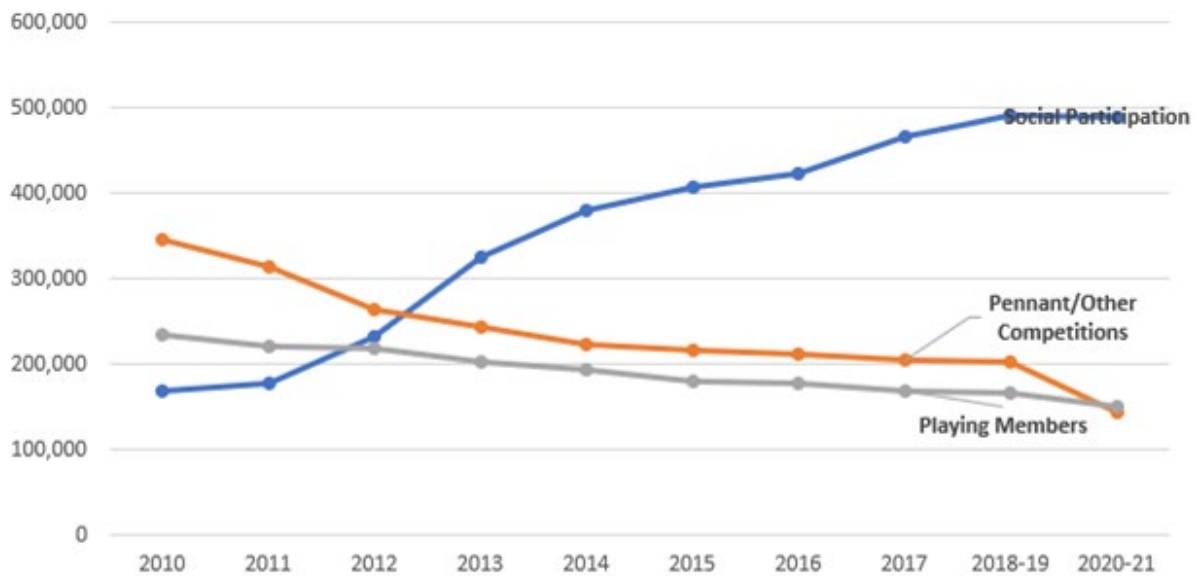
Bowls Australia (BA) and the State / Territory Associations recognise that membership and participation are fundamental to the success of the sport in an increasingly competitive environment, in which Australia’s population is increasingly conscious of the importance of health and leisure, but at the same time, is increasingly ‘time poor’ and receptive to sport and recreational pursuits that enable participation within the constraints of a busy lifestyle.

The following graph shows that formal, or registered, Bowls playing membership has decreased progressively across Australia since 1980. *Playing members of bowls clubs nationally in 2020-21 were only 35% of those registered in 1980.* Over this same period (1980-2021) the Australian total resident population has increased by 75%, from 14.69 million to 25.70 million, at an average annual rate of 1.4%. *Note: In the ACT, playing membership numbers have declined by approximately 40% in the past 10 years.*



Whilst Playing memberships have decreased nationally (and in the ACT) very significantly over recent years, *social participation has increased – in some cases very significantly.* This shift in the consumption of Bowls represents an opportunity for ACT Bowls Clubs to future proof their business models and capitalise on this growing market segment.

Bowls membership and participation in Australia 2010-2021



Note: In the ACT in 2020/21 only 15% of total participants were pennant players.

ACT and Region Bowls clubs need business models which enable them to thrive, not survive!

Identifying strategies for how clubs can turn the problems they currently face into *opportunities*; implement new strategies to *increase membership and participation rates* to the national average (and above); and *restructure and diversify club business models* away from traditional club revenues, will be key priorities for this project.

Background

In 2019, the ACT Government, in partnership with Bowls ACT, commissioned RSM to undertake an independent Strategic Facility Review of Bowls in the ACT to assist with future planning considerations for the sport. The Review identified a number of key challenges currently facing Bowls clubs in the ACT, a summary of which is presented below.

Key Challenges Identified

- Bowls Clubs are facing a significant decline in membership. This is the most significant and immediate problem that Bowls Clubs face and must be addressed if the sport is to survive and thrive. Declining memberships are driving declining revenues and diminishing clubs' capability to adapt to the changes required to attract new members and participants.
- Many clubs are no longer able to rely on electronic gaming machine revenue to underwrite facility maintenance as they have in the past.
- Larger community licensed clubs who have historically funded greens maintenance through the Community Contributions Scheme are challenged on a larger scale as inflation in maintenance costs means that maintenance costs now exceed revenue.

A number of recommendations came from the Review, focusing on increasing participation rates; rebuilding clubs' revenue bases; and improving the quality of facilities across Canberra.

Key Recommendations

- Increase membership and participation rates to national average.
- Restructure and diversify club business models away from traditional club revenues.
- Access feasibility to establish two indoor facilities (one northside and one southside) to support market consolidation or growth.
- Independent and smaller clubs require financial and material support to develop assets and facilities.
- Clubs must support Bowls ACT to rebuild its revenue base through growing membership across the ACT.

Following the completion of the 2019 Review, the ACT Government has provided BACT with funding to implement the recommendations below. Bowls ACT is extremely grateful for this support.

1. **Restructure and diversify club business models away from traditional club revenues; and**
2. **Clubs must support Bowls ACT to rebuild its revenue base through growing membership across the ACT.**

Who?

Bowls ACT has engaged [McLaughlin Sports Consultancy](#) (MSC) to drive the Project; and a Project Reference Group (PRG) was established to provide strategic insight throughout the project's lifecycle (refer below).

Name	Position
David Pruss	President – Bowls ACT
Garry Green	Director – Bowls ACT
Sharon Harmer	Representative Bowler – Western Creek Women's Bowling Club
Cheryl Corby	President – Goulburn Railway Women's Bowling Club
Shane Holland	Venue Manager – Town Centre Vikings
Ciaran O'Rourke	Executive Officer – Bowls ACT
Jeremy Wilcox	Secretary Manager – The RUC (Turner)

High performing people (and organisations) usually have what is known as a "opportunity mindset" when faced with a situation, as opposed to a "problem mindset" ... and we control this, because we control how we think. Through the initial discussions MSC has had with the PRG, it is clear they feel the time is right to make evidence-based decisions relating to future of Bowls ACT affiliated clubs, in order to support clubs' implementation of **business models which enable clubs and the sport of Bowls in the ACT and Region to thrive, not merely survive**. This mindset will be critical if outcomes from this Project are to future proof the sport of Bowls in the ACT and Region.

Problem vs Possibility

How and When?

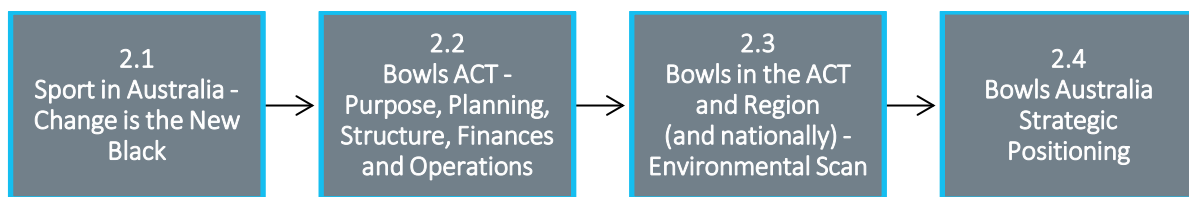
<p>Stage 1 – Project initiation meeting MSC to facilitate a project initiation webinar with the BACT President and EO.</p>	<p>14 Jan 2022 Complete</p>
<p>Stage 2 – Project Reference Group (PRG) meeting MSC to facilitate a project initiation meeting via webinar with the PRG – e.g. BACT EO, 1-2 BACT Board members, 3-4 key Club representatives.</p>	<p>27 Jan 2022 Complete</p>
<p>Stage 3 – Document Review MSC to undertake a thorough document review to become familiar with all relevant BACT and club strategic information, e.g. BACT facilities review reports, current BACT and club strategic plans, annual reports, governance and staff structures, financial models, operating models, BA optimal governance model project outcomes, BACT and club membership and participation data, BACT participation, commercial, digital; and other plans in place + other relevant information, as available/recommended by the PRG.</p>	<p>Late Jan - Feb 2022 Complete</p>
<p>Stage 4 – Clubs Survey MSC to development, disseminate and analyse data to come from a bespoke club e-Survey.</p>	<p>Feb 2022 Complete</p>
<p>Stage 5 – Stakeholder Interviews MSC to prepare for and facilitate up to 20 x 1-on-1/small group telephone interviews with key stakeholders (e.g. BACT, representatives of each BACT affiliate club, ACT Government, BA, other BA STAs).</p>	<p>Early Mar 2022 Complete</p>
<p>Stage 6 – Clubs Focus Group Session MSC to prepare for and facilitate a 2-3 hour face to face focus group session with key Bowls ACT affiliated club (and parent / licensed club) personnel (e.g. up to 40 people).</p>	<p>19th April 2022 Complete</p>
<p>Stage 7 – Findings and Opportunities Paper MSC to use all evidence collected and analysed via Stages 1-6 to develop a comprehensive <i>Findings and Opportunities Paper</i>, including club business model design concepts and strategies designed to restructure and diversify club business models away from traditional club revenues; and to support Bowls ACT to rebuild its revenue base through growing membership across the ACT.</p>	<p>29th April 2022 Complete</p>
<p>Stage 8 – PRG meeting MSC to facilitate a project initiation meeting via webinar with the PRG to discuss the contents of Stage 7 (above).</p>	<p>3 May 2022</p>
<p>Stage 9 – Fit for Future Purpose Club Operating Models Design Lab MSC to prepare for and facilitate 5-6 hour a face to face design lab with up to 30 key stakeholders (i.e. PRG and club reps) to check and challenge Fit for Future Purpose Club Business Model design concepts and strategies. This co-construct process will also identify potential stakeholder responsibilities, necessary actions and agreed consultation that may be further required for the Club business model/s to progress to implementation. The definition of potential barriers to success and how these may be minimised and/or eliminated will further support an improved model for implementation (refer Stage 11).</p>	<p>10 May 2022</p>
<p>Stage 10 - Fit for Future Purpose Club Operating Model Design Lab – Findings Summary Paper</p>	<p>18 May 2022</p>
<p>Stage 10 – PRG meeting PCG meeting to share the findings to come from Stage 9 (above) with the PCG and to confirm and finalise the PCGs preferred Club Operating Model concept design/s.</p>	<p>23 May 2022</p>
<p>Stage 11 – Implementation Plan MSC will use information collected in Stage 10 (above) to develop a detailed, yet user-friendly Fit for Future Purpose Clubs Project (Restructuring and Diversifying Club Business Models) Implementation Plan.</p>	<p>1 June 2022</p>

About this Paper

This Paper highlights a series of preliminary findings and opportunities (*not recommendations*) identified during the initial stages of research conducted by McLaughlin Sports Consultancy (MSC) in its undertaking of an independent Review of UQ Sport’s Club Affiliation Model.

Key Findings

Section 2 of this Paper presents a number of *key findings* to come from *Project Stage 3 – Document Review*. Findings in this section are tabled in the following 4 focus areas:



→ **Section 3** of this Paper presents *key findings* to come from *Project Stage 4 – Clubs e-Survey*.

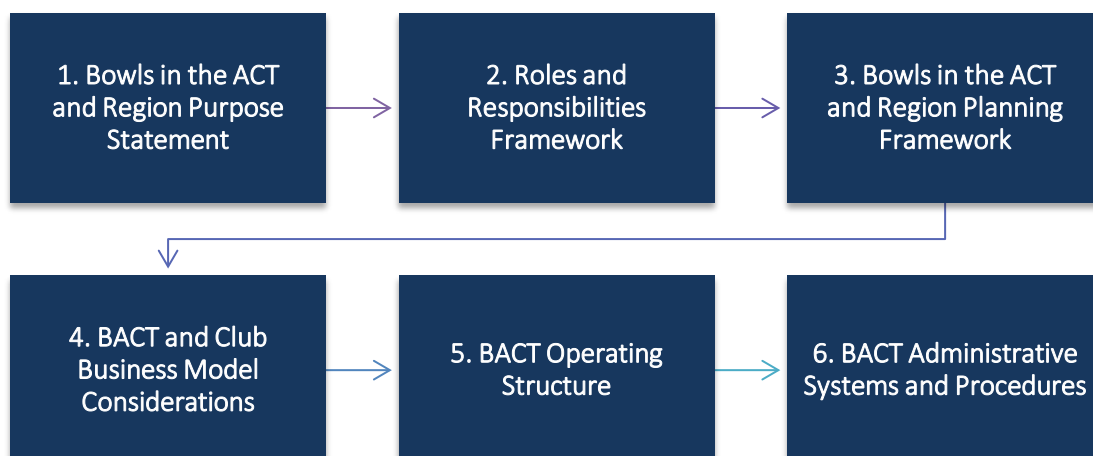
→ **Section 4** of this Paper presents key *preliminary findings* to come from *Project Stage 5 – Stakeholder Interviews*.

→ **Section 5** of this Paper presents *key findings* to come from *Project Stage 6 - Clubs Focus Group Session*.

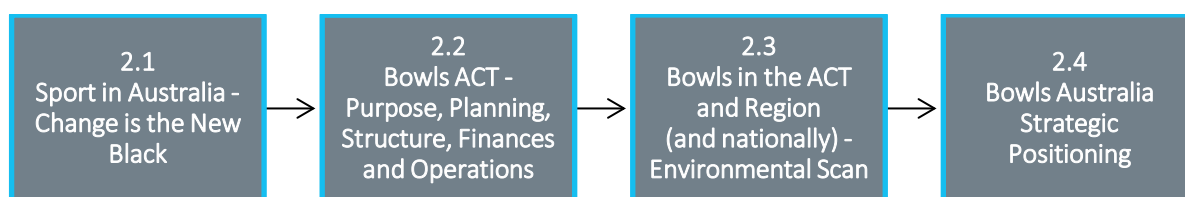
Preliminary Opportunities

Section 5 of this Paper presents a select number of *opportunities* to come from the document review, club e-survey, stakeholder interview and clubs focus group session stages of the Project. These opportunities are presented in the following 6 focus areas for the PRG to consider, prior to MSC undertaking future stages of the project.

Fit-4-Future Purpose Clubs: Business Model Opportunity Focus Areas



Section 2: Document Review Findings



2.1 Sport in Australia – Change is the New Black

- Intergenerational Review of Australian Sport (2017)
- Sport for all? Why Australian sport needs to embrace informal participation (Monash University, September 2021)
- Sport 2030, Sport Australia (2018)
- Emerging Trends in Sport Participation, Sport Australia (2021)
- Australian Sports Professional Association National Sport Census (2021)
- The Future of Australian Sport – Megatrends Shaping the Sport Sector over the Coming Decades, CSIRO (2013)
- Participant Market Segmentation, Australian Sports Commission (2015)
- World Bowls Review - 2021

→ Intergenerational Review of Australian Sport (2017)

Australia’s rich sporting tradition – and the many benefits we enjoy as a result of our sporting culture – is at risk of being eroded, with a number of trends impacting Australians’ participation in sport and our future performance. For example, sport is being increasingly marginalised in schools, with less hours spent on sport and physical education and fewer PE trained teachers. Inactivity and obesity are rising, with 81% of Australian children not meeting the recommended activity guidelines, over 50% of adults living sedentary or low activity lifestyles, and two-thirds of adults and one-quarter of children being overweight or obese. Even for those with active lifestyles, we are increasingly time-poor, **challenging traditional club models and the social cohesion they bring**. And, while some sports – particularly AFL, NRL, and Cricket – are successfully growing and commercialising, many others are struggling to maintain exposure and sponsorship, contributing to a widening wealth gap between the commercial sports and the broader sports community.

Together, these trends are rapidly changing the environment in which sport operates and placing pressure on the sector to change. However, doing so will be challenging given a number of structural constraints within the sector, such as the complex and fragmented federated governance structures within the vast majority of sports, and a shortage of key skills, such as in technology and data.

If the current trends affecting sport continue, the impact will be significant – for the individual, our communities, our international sporting success and on the organisations which govern and delivery sport – with many of today’s benefits eroded. ***Without action, Australia is at risk of transitioning from a nation of active sport participants to a nation of passive sport consumers.***

Our involvement in sport, if current trends continue, will fall, with adult participation predicted to drop by over 15% by 2036. The diversity of our sports sector will decline, with smaller sports expected to lose share to the richer, commercial codes, *impacting community club structures, volunteer numbers, and social capital*.

The pipeline of talent for Olympic and Commonwealth Games sports will shrink, creating a risk that we fall outside the top 15 on the Olympic medal tally by 2036, especially given many of our competitor countries are increasing funding. And, we will lose many of the indirect benefits we enjoy as a result of being an active, sporting nation at a time when issues like obesity, chronic disease and social cohesion are some of the nation's top challenges. Together this means the return from every dollar spent in sport is predicted to fall, with an increase in the return from the consumption of sport, masking a larger decline in the benefits from participation in sport.

→ **Sport for all? Why Australian sport needs to embrace informal participation (Monash University, September 2021)**

On the back of a successful medal tally at the Tokyo Olympics, and with a focus on the Brisbane 2032 Olympics, Sport Australia is now doubling down on its efforts to get more Australians involved in organised sport by helping “*Australians understand the value and benefits of organised sport*” ([2021-2025 Corporate Plan](#), page 7).

In seemingly ignoring the many and varied forms of sport participation that have growing appeal for Australians, Sport Australia could be missing a golden opportunity to move with the times. While Australians may be turning away from organised formats, particularly around the pre-teen and teen years, they're still participating in sport through a range of informal, community-generated opportunities.

Other forms of participation

Across a range of sports, we've witnessed a rise in other forms of participation that sit outside club-based, organised formats. People are congregating to play pick-up soccer, forming cycling pelotons on public roads, joining in park fitness groups, entering challenge events (half-marathon, Tough Mudder, open-water swims), and engaging in sport on their terms with a degree of flexibility that fits their increasingly complex lifestyles.

The [Future of Australian Sport](#) report was the first national-level document to acknowledge this trend – and the current Sport 2030 [national sports plan](#) appears to recognise both its growth and significance. Notably, the Sport 2030 plan states that “sport” and sport policy encompass a “*broad range of physical activities including informal, unstructured activity ... structured sport, and new and evolving sport and physical activity offerings*” (p6).

Popular in underrepresented communities

Findings to date point to informal sport as a significant part of sport participation in Australia. This format is particularly popular with communities traditionally underrepresented in organised sporting opportunities, including newly-arrived and multicultural communities, and individuals from low socio-economic backgrounds.

Informal sport opportunities are generally free or low-cost, are flexible in terms of timing and commitment, and groups can dictate terms of involvement through rules modifications and equipment to best suit the needs of the group. They're self-regulating without the need for coaches, umpires or referees.

Many of the groups studied have been playing together for more than a decade, regularly bringing together groups of 40-50 people from their local communities multiple times per week. One informal women's soccer group was attracting upwards of 100 participants weekly pre-COVID-19 lockdowns.

Such participation serves the community in multiple ways, *including providing a base for more formal sporting forms.*

Commentary

→ *Unfortunately, in addition to the challenges presents above, the Australian sporting sector, inclusive of licenced club elements of this sector, is now also having to deal with the impacts of COVID-19, e.g. less members, less volunteers, financial pressures, etc. The mindset / guiding principle used when developing a **Fit-4-Future Purpose** Bowls Club Business Model should be, "What opportunities are presented to clubs and Bowls ACT in this situation", not "what problems do we need to overcome". There is a difference!*

How Bowls ACT and the broader ACT and Region Bowls community engages with less formal forms of the sport, as part of its participation and affiliation / membership mix, is a prime example of this mindset.



→ Sport 2030, Sport Australia (2018)

Australia and the role of sport and physical activity in our society has changed.

Society is changing, Australia as a country is changing and sport needs to change too to avoid the classic traps of complacency, stasis and overconfidence that can be the product of decades of success and a failure to adapt to changing times.

- *Priority # 1 - Build a more active Australia — More Australians, more active, more often.*
- *Principle # 1 - Sport and physical activity for all, for life: every Australian, at all stages of their life, can undertake the exercise they need and want in a safe, fun and inclusive way, whether it is through sport or other types of activity.*

Commentary

→ *Sport 2030 is Australia’s first ever long term strategy for sport in this country. Notably, the focus of the Strategy is not only sport, but “exercise and other types of physical activity”. This may have significant implications for the sport sector, who have traditionally been the sole focus of Sport Australia funding and support. Now, various types of organisations and entities who play in the active recreation / exercise space are partnering with Sport Australia to help deliver the Sport 2030 plan. Bowls ACT and its affiliated clubs benefitting from this shift in focus presents as an opportunity.*



Plan on a Page

SPORT 2030

Australia: To be the world’s most active and healthy sporting nation, known for its integrity and sporting success.

STRATEGIC PRIORITIES

Building a More Active Australia

Achieving Sporting Excellence

Safeguarding the Integrity of Sport

Strengthening Australia’s Sport Industry

MISSION

Reduce inactivity amongst Australians by 15% by 2030

National pride, inspiration and motivation through international sporting success

A fair, safe and strong sport sector free from corruption

A thriving Australian sport and recreation industry

TARGET

More people of all ages engaged in sport and physical activity throughout every stage of their life

A world class high performance system that is empowered to achieve sporting success through tailored approaches for sports and athletes

Australian sport is seen as safe, trustworthy and fair with secure, reliable systems for deterring, detecting and dealing with threats to competition

A strong, viable, contemporary and inclusive sports industry with high quality successful organisations driving economic and social benefits

Improved physical health

Improved mental health

Personal development

Strengthening our communities

Growing the economy

OUTCOMES

→ Emerging Trends in Sport Participation, Sport Australia (2021)

In September 2021, Sport Australia released a Paper outlining [Emerging Trends in Sport Participation](#), with current and future COVID-19 impacts front of mind. A 2-page infographic *Summary of Findings and Opportunities* to come from this research is provided on the following 2 pages, with its conclusion (refer below) succinctly highlighting some key opportunities to be considered in the development of fit for future purpose ACT and Region Bowls Club operating models.

Conclusion

“The impact of the COVID 19 pandemic quickly revealed that much of what the Australian sport sector had consistently relied upon from a format, structural and community based delivery model heavily reliant on volunteers, *was not future proof, nor the only alternative to connect people to physical activity opportunities.*

If Australian sport is to become stronger and more resilient to future threats, it needs to *adopt a more flexible and agile model that is responsive to; and meets contemporary demands.* With every major challenge experienced, opportunity often follows. *Sport providers should consider the value of social, flexible and consumer-centred products for participants and volunteers, which are adaptable, more inclusive and affordable.*

COVID-19 is predicted to remain part of life for the future and all Australians must learn to live with the changes it has enforced on our communities— including sport. If sport does not respond sufficiently and differently as part of its recovery, it will be vulnerable to future crises. *Now is the time to create a new Australian sports sector”.*



PHYSICAL WELLBEING

Sport continues to be repeatedly disrupted across Australia due to the ongoing COVID-19 pandemic.



Young Australians



ISSUE

Data from Sport Australia's national AusPlay survey reports only 43% of children under 15 years participated in organised sport at least once per week in 2020 – down from 55% in 2019. [\[AusPlay, 2021\]](#)

The current pandemic may lead to a generation of young people 'lost' to sport due to many children missing out on sporting experiences during 2020 and 2021.

Organised sport offers physical and emotional development benefits for children. Playing sport helps children learn to control their emotions and channel negative feelings in a positive way. It helps to build life skills such as teamwork, patience and self-discipline. Without this early interaction with sport, young Australians risk missing valuable and positive experiences that will help shape their lives and future behaviours.



OPPORTUNITY

The pandemic has undoubtedly taken its toll on older Australians, but despite the recent lockdown restrictions, this cohort has demonstrated a desire to be more active and drawn to physical activities involving social interactions where social distancing rules can be observed.

The [World Health Organisation \[WHO\]](#) has warned that the impact on mental and psychosocial wellbeing of vulnerable groups, such as older adults, will be significant and enduring. Seeking to accelerate and increase the positive physical activity trends observed to date by older Australians may offer significant and protective wellbeing benefits to this high risk group.

Older Australians



Older Australians appear to have been more active during the pandemic and over a sustained period.

Trends over the last two decades suggest older Australians have made an even bigger effort to increase physical activity than the rest of the population with over 65s increasing activity by approximately 30%. [\[ERASS/AusPlay, 2021\]](#)



Women

Australian adults sought new ways to be physically active while organised sport was cancelled during the first two waves of the pandemic. The trend away from organised sport participation to more recreational activities such as walking, running, cycling, and bush-walking continues to accelerate. This trend was largely led by Australia women who sustained high levels of physical activity through walking for exercise. [\[AusPlay, 2021\]](#)



Women are more likely than men to participate in these types of physical activities—particularly while they remain possible during the lockdowns. Where more adult men generally gain their physical activity through participation in organised sport activities, which have been significantly disrupted during the pandemic.



OPPORTUNITY

While the negative impact of the ongoing pandemic on women is significant and well reported—the data on physical activity for this cohort is encouraging and demonstrates women are actively seeking different and more flexible ways to be active.

There is an opportunity here for sporting organisations to respond to this trend by offering more flexible and inviting organised sport participation opportunities for Australian women. These products would place less emphasis on the more traditional competition elements of organised sport, instead focusing on social participation pathway opportunities specifically tailored to women and girls.



ISSUE

While barriers to sport and physical activity participation for Australians living with a disability continue—the ongoing physical, social and mental health challenges could be further compounded by the pandemic. There remains a high risk that even the thought of returning to a former physical activity habit or behaviour for this group of vulnerable Australian will present a significant personal challenge.

People with a disability



The closures of day programs for people with disability as a consequence of the pandemic continues to cause serious harm to the mental health of this vulnerable group of Australians [\(ABC, 2021\)](#).

Australians living with a disability have been unable to access physical or social activities, and many will not have the ability to adopt new activities as substitutes. Increased barriers to participation, disruption and reductions in available services and routines may lead to many being unable or unwilling to re-engage in sport and physical activity.





OPPORTUNITY

Social and recreational activities have proven to be popular during the pandemic—and the rise of new digital offerings has provided Australians with more convenient ways to be connected and physically active. As sport emerges from the pandemic, it is likely many people will prefer to retain newly adopted physical activity habits and not return to former and more traditional sporting activities. Sporting organisations will need to consider offering participation products that meet the contemporary demands and lifestyle choices of many Australians.

Recreational activity and social sport



While the trend away from organised sport participation to more recreational activities has accelerated during the pandemic, especially for women and older Australians—adult men were more likely to increase participation in socially distanced sports such as golf and surfing.

People were about 3-5% more physically active during the lockdown period between April and June 2020 [AusPlay, 2020]. Organised sport participation was not possible for public health reasons during this time.

Technology has also played a significant role with 39% of Australians using digital platforms to exercise during the national lockdown in 2020. The use of digital platforms is projected to continue as Australians invest further in wearable fitness tech, at-home fitness equipment, and fitness apps. (Deakin University, 2021).

MENTAL WELLBEING



The necessary implementation of social restrictions due to public health orders, combined with the cancellation of sport and other community engagement opportunities, has impacted the mental health of many Australians. Research supporting the benefits of sport participation on positive mental health outcomes across the life course is well documented.

Despite reported high levels of psychological distress in 2020 among Australians (ABS, 2021), Sport Australia's

Community Perceptions Monitor survey found that people who were finding it easier to keep fit and active during the pandemic reported feeling more optimistic and connected, with greater personal well-being.



OPPORTUNITY

The mental health of Australians has been impacted across all generations and is likely to remain a challenge for communities and the Australian health system for many years. Although sport is not the only answer, it can play a valuable role in rebuilding mental health and reconnecting people and communities.

FINANCIAL WELLBEING



The cost of sport in the current financial climate will likely remain a barrier while the impact of the pandemic affects the disposable income of Australian households.

The [Australian Institute of Family Studies](#) reported Australians are generally reducing their spending rather than increasing debt. The cost of accessing sport is particularly difficult for Australian households currently experiencing financial hardship. The impact has likely been exacerbated for disadvantaged communities, particularly those where a higher proportion are Aboriginal or Torres Strait Islander peoples.

With costs being an issue for many Australians, this will likely impact how much importance is placed on paying for traditional organised sports. Combined with the increasing trend towards free and lower cost outdoor and recreational physical activities, organised sport participation is at risk of becoming a more discretionary priority with many Australians.



ISSUE

Not-for-profit sporting organisations and clubs are very dependent on membership income as a primary source of revenue. A significant drop in paid membership due to household affordability pressures will have a devastating impact on community sport in Australia. The flow-on effect will likely see a reduction in the sport and physical activity opportunities available to all Australians—and a subsequent physical health and mental wellbeing decline across the national population.

An erosion of the grassroots sport base in Australia will see significantly less people participating in sport—particularly participation in the more diverse and relatively smaller Olympic and Paralympic sports. This will impact the number of young Australians entering into the sport talent pathway and emerging as our future national sports representative.

As we enter the green and gold runway towards [Brisbane 2032](#), providing a strong community sport pathway for our future Olympic and Paralympic representatives will be an important focus—particularly for the current generation of young Australians.

CONCLUSION

The Australian sport sector was not prepared for a national crisis. The impact of the COVID 19 pandemic quickly revealed that much of what the sector had consistently relied upon from a format, structural and community base delivery model heavily reliant on volunteers, was not future proof nor the only alternative to connect people to physical activity opportunities.

If Australian sport is to become stronger and more resilient to future threats, it needs to adopt a more flexible and agile model that is responsive to and meets contemporary demands.

With every major challenge experienced, opportunity often follows. Sport providers should consider the value of social, flexible and consumer-centred products for participants and volunteers which are adaptable, more inclusive and affordable.

COVID-19 is predicted to remain part of life for the future and all Australians must learn to live with the changes it has enforced on our communities—including sport.

If sport does not respond sufficiently and differently as part of its recovery, it will be vulnerable to future crises. Now is the time to create a new Australian sport sector.

Commentary

→	<p>The saying, “If you don’t change direction, you are likely to end up where you are heading” is very relevant to Bowls in the ACT at present. How a Fit-4-Future Purpose Bowls ACT Club delivery model can capitalise on the opportunities identified by Sport Australia will be a focus of the project as it continues.</p>
---	--

→ Australian Sports Professional Association National Sport Census (2021)

Report Excerpt

“Expanding on sentiment expressed in the 2020 Census, respondents saw this as a critical time for sport in Australia, which could lead to positive outcomes **if organisations and individuals embrace change**. Respondents reflected that failure to adapt and enhance the way sport is delivered within Australia runs the risk of a substantial loss of capacity due to unsustainable funding models, a loss of volunteers, and the grassroots seeking alternative options to fill their fitness and social needs.

→ The Future of Australian Sport – Megatrends Shaping the Sport Sector over the Coming Decades, CSIRO (2013)

In 2013, the CSIRO collaborated with Sport Australia to identify **6 megatrends likely to shape the Australian sports sector over the next 30 years**. A megatrend represents an important pattern of social, economic or environmental change. Megatrends occur at the intersection of multiple trends and hold potential implications for policy, investment and project / program choices being made by community groups, industry and government. **The 6 megatrends in sport were identified as:**

- 1. A perfect fit** – Individualised sport and fitness activities are on the rise. People are trying to fit fitness or sport into their increasingly busy and time-fragmented lifestyles to achieve personal health objectives.
- 2. From extreme to mainstream** – This megatrend captures the rise of lifestyle, adventure and alternative sports which are particularly popular with younger generations. These sports typically involve complex, advanced skills and have some element of inherent danger and/or thrill-seeking.
- 3. More than sport** – The broader benefits of sport are being increasingly recognised by governments, business and communities. Sport can help achieve mental and physical health, crime prevention, social development and international cooperation objectives.
- 4. Everybody’s game** – Australia and other countries of the Organisation for Economic Cooperation and Development (OECD) face an ageing population. This will change the types of sports we play and how we play them.
- 5. New wealth, new talent** – Population and income growth throughout Asia will create tougher competition and new opportunities for Australia both on the sports field and in the sports business environment.
- 6. Tracksuits to business suits** – Market forces are likely to exert greater pressure on sport in the future. Loosely organised community sports associations are likely to be replaced by organisations with corporate structures and more formal governance systems in light of market pressures. The cost of participating in sport is also rising and this is a participation barrier for many people.

The active lifestyle that has played a significant role in establishing our nation’s identity, culture and international sporting reputation is being challenged by the demands of modern life and an increasingly sedentary lifestyle.

According to OECD, Australia has the fifth highest rate of adult obesity in the developed world. The 2007–08 National Health Survey found that 68% of adult Australian men and 55% of adult women were overweight or obese.

In order to reinvigorate engagement in sport amongst our community and to regain our competitive edge, as a nation *we need to do things differently*.

We need to place a strategic focus on collaboration, reform and investment across the entire sporting pathway – from the grassroots up. A new whole-of-sport approach is essential to boost sporting participation and enhance sporting pathways for the benefit of health and productivity while also contributing to and sustaining our international success.

Fundamental to this new approach is moving away from the divisive *community versus elite* sport debates of the past and developing a collaborative, efficient and integrated national sports system focused both on growing participation for the benefit of our community as well as the high performance system.

Recent estimates put the cost of physical inactivity to the Australian economy at \$13.8 billion per year, as a result of healthcare costs (\$0.721.5bn), lost productivity (\$9.3bn) and premature mortality (\$3.8bn). Sedentary lifestyles are the fourth highest risk factor in reducing Australian productivity, behind smoking, high blood pressure and obesity (two of which can be reduced by being more active). ***Australians need to get moving.***

The Australian Government is committed to ensuring sporting opportunities are safe, fun and inclusive *for all community members* and to supporting sport to ensure that our nation’s diversity is reflected in participation.

Commentary

→	<i>Bowls ACT and its affiliated clubs have the opportunity to be leaders in the Australian community sport sector, in relation to implementing evidence-based, flexible and relevant membership and participation models and offerings, which allow more people to engage with Bowls in the ACT and Region in meaningful ways; and which financially future proof Bowls ACT affiliated clubs and Bowls ACT .</i>
---	--



→ Participant Market Segmentation, Australian Sports Commission (2015)

Current Club Member Market Segments – Adolescents & Adults

Loyalists

Sport is their life. They enjoy all aspects of sport — including the competitive and social elements — and derive confidence from participation. Loyalists are particularly motivated by competitive success and participate regularly in a range of individual and team-based sports. As Loyalists live for sports, most view it as an imperative to be part of a club. Members of this segment derive a strong sense of pride from belonging to a club. They provide them with a platform for personal / competitive success, an overall sense of achievement and a valued social network.

Commentary

→	<i>Less than 1 in 10 Australians are Loyalists. The Loyalists segment is made up of a high proportion of males under the age of 40, and comprises a particularly high proportion of teenagers.</i>
→	<i>Interestingly, the majority of sports club administrators and coaches are (or were) loyalists and are very passionate about their sport. This is great, in that they are the backbone of Australia’s volunteer sport delivery system, yet a concern in another way, in that they may not understand the “less competitive” participation motivations of many Australians who are currently participating in the club, or who may like to.</i> <i>A key risk facing the significant and sustainable growth of the Australian sporting landscape, is that volunteer run clubs are the sole delivery point in most cases; and a significant proportion of clubs do not want to grow and/or offer new (less competitive) participation offerings, due to the additional workload this creates.</i> <i>How Bowls ACT and its affiliated clubs address this situation should be a focus of any new Fit-4-Future Purpose club business models.</i>

Socially Engaged

The Socially Engaged enjoy all aspects of sport, especially the social aspect. They prefer to play sport with others and — while not adverse to competition — *are more interested in challenging themselves and having fun*. This is a very valuable segment as they are highly engaged with sport and clubs.

Promoting new or other sports/activities could provide higher involvement given their social nature and status as influencers. While the social aspects of clubs are important, the competition element should not be diminished.

What motivates potential members?

Sport Driven

Sport Driven club members do a lot of physical activity, but keep their social activity within the club to a minimum. This segment is often younger, wealthier urbanites, with a high proportion from culturally and linguistically diverse (CALD) backgrounds.

Motivation for participating tends to be more personal and focused on self-improvement. The club is a place for them to access facilities and participate, but they don't necessarily want involvement beyond this. Sport Driven consumers can be at a busy life stage – they are often balancing membership with family and work commitments. While they appreciate the camaraderie clubs offer, it is the sport rather than the social aspects of clubs that are paramount. Their relationship with clubs is less assured; they may move to non-club segments so the challenge is to keep them engaged and help them to fit club membership into their live.

Apathetic Clubbers

Despite being highly active in both sport and physical recreation, this segment is somewhat apathetic in their attitudes towards sport and clubs. They do not like competition and are less likely than other club segments to feel very positive toward sport or clubs, with some viewing sports as a chore.

Relative to other club member segments, Apathetic Clubbers tend to find value in clubs for their facilities rather than the elements of competitiveness and socialising. Some feel pressure that you need to be good at sport to be part of a club. While they initially enjoyed their membership, this appears to be waning.

Commentary

→	<i>This segment would benefit from feeling less pressured to be good at Bowls, in order to continue enjoying it. There needs to be a focus on ease of entry in terms of ensuring everyone feels they can join / participate, regardless of skill level or motivation. There may be a need to promote the social and fun aspects of clubs to reinvigorate this segment, who are at risk of dropping out, particularly if there is a change in their circumstances.</i>
---	---

Non-Club Members with High Potential for Acquisition – Adolescents and Adults

Sideline Sportsters

Sideline Sportsters are into sport and value the opportunity it provides to have some personal time, relax and break up their routine. They particularly enjoy the camaraderie and friendships that come from being part of a sports team. The competitive aspect is also a key component in their enjoyment.

They would be quite comfortable at sports clubs given their ability to hold their own in a sporting context. Many would have been club members as children (even up to adulthood) and it would not necessarily have been their choice to stop but rather their changed circumstances. They retain a positive perspective on clubs and their benefits.

This group needs greater flexibility from clubs but doesn't necessarily see this as the club's responsibility. They view their changed priorities as the reason they cannot commit as much time or money.

Commentary

→	<i>This is a key target group for acquisition into Bowls clubs as they have all the hallmarks of keen, but lapsed, sports club members. Given their interest in sport overall, there may be opportunities to attract this segment with products outside of the traditional club offer to address concerns with time and cost commitments.</i>
---	---

Club Wary

The Club Wary are very positive about sports, though they want to enjoy their sport at a slightly less serious and competitive level. It is as much about challenging themselves and doing something active with friends.

Club Wary are not particularly critical of clubs but have some reservations given past experiences as members. While they appreciate the social and emotional benefits that clubs can offer, they see clubs as requiring significant commitment and lacking in flexibility. The Club Wary do not always feel they will fit in at clubs and can be slightly self-conscious about playing sport with others.

This group is a realistic target for acquisition but clubs need to be proactive in their communication.

Commentary

→	<i>To attract this segment, the Bowls ACT affiliated club delivery network will need to avoid a sense of over-commitment or competition when messaging and with the products offered.</i>
---	---

Ponderers

Often married with children at home, Ponderers are active people but commitments to work, study and family take up much of their time. They fit in a reasonable amount of physical activity but this is mainly recreational and focused on activities that can be done alone and around other commitments.

Typically, they were members of clubs into adulthood when for practical reasons they felt they had to give up. They have a fairly positive view of clubs both socially and as a way to support health and fitness. Though less competitive than many other segments, most show at least some interest in joining clubs.



Commentary

→	<p><i>Bowls ACT club membership / participation opportunities could be seen as a way for ponderers to escape their normal routine, and membership should include flexible participation and cost options, whereby they feel they can join without neglecting other commitments.</i></p> <p><i>Additionally, there may be opportunities for the Bowls ACT club delivery network to attract this segment with products outside of the traditional club offerings that address concerns with time and cost commitments, but provide an avenue to encourage participation and social connection.</i></p>
→	<p><i>The Sport Australia research provides key insights regarding how sport participation and membership (in all consumer segments) is negatively impacted upon by the following participation barriers:</i></p> <ul style="list-style-type: none"><i>- Sport delivery that focuses heavily on competition rather than fun and enjoyment;</i><i>- A lack of flexibility around the scheduling of sport in traditional sporting clubs;</i><i>- Organising individuals and teams according to talent, rather than retaining friendship groups;</i><i>- Limited opportunities for people with limited sports competency to join sporting clubs; and</i><i>- Self-consciousness amongst adolescents and embarrassment by their lack of sporting ability.</i> <p><i>Bowls ACT working with affiliated clubs who are keen to grow their membership and participation numbers and revenue, to do so, by using insights to come from Sport Australia’s market segmentation research (and other evidence presented above), presents as a potentially significant value proposition associated with these clubs being affiliated with Bowls ACT.</i></p>

→ World Bowls Review - 2021

The following information are direct excerpts from the Review Report.

In September 2021, World Bowls (WB) commissioned an external review of its governance, management and operations. The overall aim of the review is to ensure the organisation is structured in line with best practice and positioned to achieve its future goals. The Board appointed experienced management.

The Sentiment For Change

Throughout this process, we have taken the view that ***the game, its brand and profile must grow for World Bowls to be around for the next 50 or 100 years. The organisation cannot sit still***, nor can it continue to operate in the same way into the future.

There must be pragmatic outcomes from this review. ***Change is a must*** – as there have been too many reviews done over the journey with little (perceived) change or elevation of organisational performance.

Revenues will unlock the ability to invest in more people with right skill sets to help grow the sport. *Paralympic and the Olympic recognition* – while this is a stretch to think about for some, in the short/medium term we recommend that you pursue this opportunity vigorously!

Lastly, *the game needs a global event that is fast/fun and full of energy* to break open the commercial revenue opportunities that will provide the best chance for organisational success – and long-term survival.

The following are words directly used by stakeholders engaged in the Review.

- *“The game is at a crossroads for its future.”*
- *“Are we on a burning platform – or is it simply too late?”*
- *“Sport as an industry is about innovation – if you are not innovating, you are dying.”*
- *“We want this sport to take off – it has to be more open, accessible, inclusive and engaged with its local community. The traditional staple of the game is in steady decline. It needs to be much more inclusive than it is now. It is simply too traditional.”*
- *“Why can’t we take the notion or idea that all bowls is bowls ... no matter what form, game, rules or format. We are at the cross roads – our own bias is all wrong – it is all bowls.”*
- *“This sport is in need of a shake-up. We need to modernise the sport. We have lost a generation of bowlers – you just need to look at the numbers and the lack of coverage we get.”*
- *“The overall attitude at World Bowls is we can’t do that ... it is NO. It is not about how can we challenge it or change it. We should all be stepping up – is there anything we can do to help? Are we considering alternatives formats? It seems to be always NO, NO, NO. I just don’t know where we are at, as a sport globally.”*

Commentary

- | | |
|---|---|
| → | <i>Although the quotes above come from a review of World Bowls, it is likely that many of the sentiments expressed appear extremely relevant to Bowls in the ACT. This assumption will be tested in future stages of this project. The role that Fit-4-Future Clubs Project can play driving the modernisation of the sport of Bowls in the ACT and Region and its delivery system should be a key focus.</i> |
|---|---|



2.2 Bowls ACT - Purpose, Planning, Structure, Finances and Operations

- Purpose
- Planning
- Structure
- Finances
- Operations

→ Purpose

Bowls ACT Incorporated Constitution (2020)

Statement of purposes

As the peak body responsible for Bowls in the ACT and surrounding areas, Bowls ACT will, for the benefit of its Members:

- a) promote, conduct and administer Bowls, including by staging competitions, throughout the ACT and surrounding areas;
- b) maintain membership of Bowls Australia and act in accordance with the Bowls Australia constitution, rules, regulations or policies;
- c) adopt the playing rules of World Bowls and abide by the interpretation of such rules as determined by Bowls ACT;
- d) promote the health and safety of individuals participating in Bowls in any capacity;
- e) select and manage players and teams to represent the ACT in national and other representative Bowls competitions inside and outside the ACT;
- f) encourage players, umpires, coaches and officials to contribute to the development of Bowls in the ACT and surrounding areas;
- g) pursue such commercial arrangements, including sponsorship and marketing opportunities, as are appropriate to advance these purposes; and
- h) undertake other actions or activities that are necessary, incidental or conducive to advancing these purposes.

Commentary

→

The purposes of Bowls ACT are succinct and well written. What is not clearly articulated within the purpose statement, or in the constitution, is the role Bowls ACT plays in the support, development, enhancement, or establishment of affiliated member clubs.

However, the role of Bowls ACT in the support of clubs is significantly visible within the association's 2019-2022 Strategic Plan, and is the key focus of this Fit-4-Future Purpose Clubs project.

Membership Categories

- a) Bowling Clubs;
- b) Affiliated Members;
- c) Life Members; and
- d) Such other membership category as may be determined by the Board.

Bowls ACT must have at least 5 Bowling Clubs as Members.

Commentary

→	<i>A key focus as the project progresses will be Bowls ACT and its member clubs considering the implementation of a new, modern membership model, and associated membership categories, designed to connect more people to Bowls in the ACT; diversify club business models away from traditional club revenues; and support Bowls ACT to rebuild its revenue base through growing membership across the ACT.</i>
---	---

→ Planning

Bowls ACT Strategic Plan (2019-2022)

This strategic plan aligns significantly with the Bowls Australia 2017-2022 strategic plan, in that Bowls ACT Strategic Priorities are similar with those of BA, yet are contextualised to the local needs of Bowls in the ACT and Region.

Commentary

→	<i>Although it is pleasing to see the 2019-2022 Bowls ACT Strategic Plan aligns in many ways with the BA Plan, the lack of measurable (and where appropriate quantitative) key performance indicators / proof points, presents as a weakness in the plan's design.</i>
→	<i>How Bowls ACT goes about bringing its current strategic plan to life (e.g. via costed annual operational plans, project plans etc.) and the progress the association has made in relation to the achievement of the strategic plan is unknown at this stage of the project.</i> <i>This will be clarified in future stages of the project.</i>
→	<i>In early 2022, Bowls ACT engaged McLaughlin Sports Consultancy to work with the association and its key stakeholders to develop a Bowls ACT 2022-2025 Strategic Plan, which will align with the BA 2022-2025 Strategic Plan, whilst also ensuring local ACT and Region needs are prioritised.</i> <i>The core purpose of the Fit-4-Future Purpose Clubs project is to: Support Bowls ACT affiliated clubs to implement operating models which are fit for future purpose, to enable a sustainable and vibrant future for Bowls in the ACT. This is not only the anchor point for this project throughout its lifecycle; it also presents as an anchor point for the 2022-2025 Bowls ACT Strategic Plan.</i>

Commentary

→	<i>What does not appear to be in place at present, are Participation, Commercial, Performance, or other key operational / project plans designed to bring the strategic plan to life. How Bowls ACT “plans” to achieve its 2022-2025 strategic objectives, and how it plans to implement the outcomes from this Fit-4-Future Purpose Clubs project, will be key considerations in Project Stage 11 – Project Implementation Plan; and in the design of the Bowls ACT 2022-25 Strategic Plan.</i>
---	--

→ Structure

Legal structure: Bowls ACT is a not for profit association, incorporated under the *Associations Incorporation Act 1991* [ACT].

Board Structure

- 6 Elected Directors, with an equal number of female and male Directors;
- The Finance Director, who will be appointed by the Elected Directors for an initial term of 2 years; and
- 1 additional Director, who may be appointed by the Elected Directors for an initial term of 2 years.

Staff structure

- 0.8 FTE Executive Officer
- Full-time BA Regional Bowls Manager (RBM), who services approximately 70 clubs in the ACT and southern eastern NSW.

Commentary

→	<i>The RBM is a BA resource, operating in and supporting the needs of South East NSW and the ACT, covering the areas of Canberra, Wollongong, Illawarra, Nowra, Merimbula and Goulbourn. What level of support (e.g. by way of full time equivalency) Bowls ACT receives from the RBM will be clarified in future stages of the project.</i>
---	--



REGIONAL BOWLS MANAGERS
(RBMS)

→ Committee structure

In accordance with the Bowls ACT Constitution, the Board has the power to establish and delegate any of its functions, powers or duties to such committee or committees as it thinks fit.

Current Committees:

Match Committee: The purpose of the MC is to:

- Provide recommendations and advice to the Board, and Executive Officer (EO), on strategic and/or policy matters relating to the conduct of Pennant and Championship events conducted under the auspices of Bowls ACT; and
- Assist the EO in relation to the planning, preparation, conduct and review of Pennant and Championship events.

Coaching Committee: The purpose of the Coaching Committee is to:

- Create, plan, develop and organise a high quality coaching program on behalf of Bowls ACT;
- Provide recommendations and advice to the Board and Executive Officer (EO), to ensure that sufficient coaches are accredited in the ACT to meet club and state coaching requirements and other coach related matters; and
- Be a centre of excellence on coaching for Bowls ACT.

Officiating Committee: The purpose of the Officiating Committee is to:

- Create, plan, develop and organise a high quality officiating program on behalf of Bowls ACT, including accreditation and re-accreditation of National Umpires, Markers and Measurers; and
- Provide recommendations and advice to the Board and Executive Officer (EO), to ensure that sufficient officials are accredited in the ACT to meet club and state requirements.

Commentary

→	<i>As the core purpose of the Fit-4-Future Purpose Clubs Project is to identify strategies designed to support Bowls ACT affiliated clubs to implement operating models which are fit for future purpose, to enable a sustainable and vibrant future for Bowls in the ACT, an important consideration as the project progresses, will be to ensure that a future Bowls ACT human resource structure – staff and committees optimally supports the achievement of this purpose (i.e. form follows function).</i>
---	---



→ Finances

Financial Report For the Year Ended 31 December 2020

Bowls ACT Incorporated		
ABN 33 667 725 989		
Income and Expenditure		
	2020	2019
Operating Income		
Affiliation Fees	55,943	85,897
Course Income/Workshops	191	529
Donations	30	865
Entry Fees	20,288	33,166
Fundraising Income	0	2,994
Government Grants - Triennial Funding	45,000	45,000
Interest Income	204	1,131
Other Revenue	3,181	
Player Contributions	-1,207	29,264
Sales	783	14,931
Special Grants	54,000	
Transfer Fees	91	-1,743
Total Operating Income	178,313	212,034
Merchandise		
- Opening Stock	17,896	17,001
- Purchases		17,761
- Transfer of Inventory to PPE	-2,200	
- Closing Stock	-8,699	-17,896
	<u>6,997</u>	<u>16,866</u>
Operating Expenses		
Accounting	1,659	3,500
Advertising	285	28
Bad Debts	1,000	
Bank Fees	581	1,936
Capitation Fees	35,220	20,106
Coaches & Umpires	0	180
Depreciation	1,049	609
Disability Programs	0	49
Employment Expenses - Superannuation	9,188	7,758
Honorarium / Reimbursement	6,476	7,125
Hospitality	1,453	824
Internet	1,872	
Legal & Statutory	0	1,358
Merchandise	710	
Office Insurance	8,707	9,614
Other Expenses	45	-43
Postage	190	470
Printing and Photocopying	549	990
Prize Money	4,091	9,390
Rent and Electricity	2,033	7,356
Stationery	1,712	2,356
Telecomms and IT	5,938	2,836
Travel, Meals, Accommodation	392	60,325
Trophies/Badges/Flags	2,432	7,084
Wages and Salaries	76,889	87,594
Worker Compensation	3,374	0
Total Operating Expenses	172,842	248,309
Net Profit / (Loss)	5,471	-36,275

Balance Sheet

2020

ASSETS	
Bank	
Bowls ACT	83,483
Debit Card	1,838
Term Deposit	50,000
Total Bank	135,321
Accounts Receivable	3,880
Cash on Hand	315
Inventory	8,699
Total Current Assets	12,894
Fixed Assets	
Property, Plant and Equipment	4,636
Less Accumulated Depreciation - PPE	-1,841
Total Fixed Assets	2,795
TOTAL ASSETS	151,010
LIABILITIES	
Current Liabilities	
Accounts Payable	20,272
GST	-7,923
PAYG Withholdings Payable	4,448
Superannuation Payable	3,966
Total Current Liabilities	20,763
Non-current Liabilities	
Grants to be Refunded	
Leave Accruals	1,811
Total Non-current Liabilities	1,811
TOTAL LIABILITIES	22,574
NET ASSETS	128,436
EQUITY	
Reserves	105,818
Prior Year Adjustments	17,148
Current Year Earnings	5,471
TOTAL EQUITY	128,436



Commentary

→

For the 2020 (first year of COVID-19) reporting year, Bowls ACT reported a net operating profit of \$5,471. For the same period, total assets equated to approximately 9 months of annual operating costs. Note: Several Bowls ACT events were not able to be delivered and many other COVID-19 related impacts significantly reduced Bowls ACT income. However, the association did receive \$54,000 in COVID-19 related government support in the 2020 reporting period. For the 2017 reporting year, Bowls ACT reported an operating deficit of \$71,000. For the same period, total assets equated to approximately 7 months of annual operating costs.

On the surface, the aforementioned demonstrates Bowls ACT is in a sound financial position. However, between 2016 and 2020, affiliation fees, combined with government grants have provided between **80% - 90% of Bowls ACT revenue**. As previously mentioned in the Paper, since 2010, Bowls ACT membership (which provides Bowls ACT with its affiliation fee revenue stream) has declined by 40%. Additionally, Government (be it ACT or commonwealth) funding should not be relied upon as a constant, or ongoing revenue stream.

Additionally, a State Sporting Organisation having such a small annual turnover (approximately \$200,000) does not allow the governing body to increase its human resources significantly, and/or significantly increase the services and support it can provide to its member clubs, or the programs it delivers.

Whilst the Bowls ACT financial position is sound “on the surface”, the opportunity for the association to not only increase its total revenue significantly, but to diversify its revenue streams, must be a key focus of this project.

→ Operations

Bowls ACT support the delivery a broad suite of services to its affiliated club and members. A brief summary of these offerings is provided below.

- [Events](#)
- [Coach development](#)
- [Juniors/Schools Programs](#)
- RBM support to clubs

GROWTH AND DEVELOPMENT

- Target new participants through various programs and linkages with schools
- Increase membership by converting participants into full members
- Promote the health benefits of bowls through regional service providers and community groups aiming to increase participation

PROGRAM DELIVERY

- Link with Sporting Schools Programs to expand the number of bowls programs nationwide
- Assistance with development of Junior Development Squads/Academies
- Facilitating the sale of Jr Jack Attack kits
- Facilitation of Jack Attack programs
- Facilitation of BPL Cup and Megabowl events
- Facilitate the implementation of targeted programs for non-traditional groups (CALD, PWD, WIS, and Indigenous) specific to the demographics of the region
- Providing guidance to clubs regarding the Bowls Connect program
- Attendance at trade shows and major events as required by BA/STA

CENSUS COORDINATION

- Assist census consultant to communicate census templates to clubs
- Liaise with clubs to ensure the return of completed census from clubs in a timely manner
- Record census data from a regional perspective and input on an annual basis the data specific to each club as obtained through the club health check
- Survey participants to ensure bowls stays ahead of trends in participation and input survey results on-line

GENERAL SUPPORT TO BA AND STA

- Completion of notes within the CRM upon completion of each visitation
- Completion of monthly reports
- Completion of success story articles
- Contribute to the development of BA/STA resources as required
- Contribute to the development of the RBM team
- Sharing of resources and best practice between RBMs
- Attendance at BA/STA meetings and professional development opportunities as required

CLUB DEVELOPMENT

- Work directly with clubs within the region to provide support and increase participation
- Conduct Traffic Light Assessment with all clubs within the region (annually) and enter results into the national database
- Assist clubs as required with business planning, membership programs, information technology, volunteer strategies and governance
- Contribute to the development of resources demonstrating best practice
- Build relationships with local club development providers (e.g. community groups, sporting associations etc.)
- Build relationships with Local Government Authorities with a view of increasing the grant allocations to clubs within the region
- Identify clubs without volunteer coordinators and promote the benefits of volunteer coordinators
- Assist clubs to identify and develop key personnel with the right skills to attract and retain new members and support existing volunteers
- Undertake an inclusion audit of all bowls club facilities and programs, including partnerships and links with community groups (annually)
- Link clubs with both sport and non-sport community groups (e.g. low socio-economic groups, baby boomers, younger adults, juniors and schools, disengaged men/women, strategies to combat obesity in inactive older adults, CALD, persons with disability, indigenous, etc.)
- Work constructively with business partners that can both be of a benefit to individual Clubs and the sport as a whole

DEVELOPMENT OF COACHES AND OFFICIALS

- Assist in the delivery of NCAS/NOAS education within region
- Audit existing coaches and identify recruitment gaps and training needs
- Provide coach/officials with BA approved re-accreditation/professional development opportunities to meet identified training needs of individual coaches where required
- Conduct/coordinate coach/official professional development sessions

Commentary

→

It is apparent that the RBM responsible for servicing the ACT and Region (which incorporates 16 BACT affiliated clubs) is responsible for servicing a total of approximately 70 clubs. The level of support provided to Bowls ACT affiliated clubs and Bowls ACT, and how this can be maximised, will be explored in future stages of the project.

The roles of the RBM, as they relate to this project are numerous (refer below). How the valuable RBM resource, other BA resources and ACT Government resources can assist Bowls ACT and its affiliated clubs to implement key outcomes of this Fit-4-Future Purpose Clubs project, presents as a key opportunity.

RBM Roles – Club Development:

- *Work directly with clubs within the region to provide support and increase participation;*
- *Conduct Traffic Light Assessment with all clubs within the region (annually) and enter results into the national database;*
- *Assist clubs as required with business planning, membership programs, information technology, volunteer strategies and governance;*
- *Contribute to the development of resources demonstrating best practice;*
- *Build relationships with local club development providers (e.g. community groups, sporting associations etc.);*
- *Build relationships with Government Authorities with a view of increasing the grant allocations to clubs within the region;*
- *Identify clubs without volunteer coordinators and promote the benefits of volunteer coordinators;*
- *Assist clubs to identify and develop key personnel with the right skills to attract and retain new members and support existing volunteers;*
- *Undertake an inclusion audit of all bowls club facilities and programs, including partnerships and links with community groups (annually);*
- *Link clubs with both sport and non-sport community groups (e.g. low socio-economic groups, baby boomers, younger adults, juniors and schools, disengaged men/women, strategies to combat obesity in inactive older adults, CALD, persons with disability, indigenous, etc.);*
- *Work constructively with business partners that can both be of a benefit to individual Clubs and the sport as a whole.*

Note: *BA working closely with BACT, both via its RBM/s and other mechanisms, to assist in the delivery of the Implementation Plan to come from this Review presents as a key and mutually beneficial opportunity.*

BACT would benefit from the resource support; and BA would benefit from the learnings to come from BACT's delivery of the Fit-4-Future Purpose Clubs Implementation Plan, with a view to using these learnings to support other STAs who are impacted by similar issues to those impacting BACT.

2.3 Bowls in the ACT (and Nationally) Environmental Scan

- Bowls ACT Membership and Participation Data
- BA National Membership and Participation Census
- Strategic Facility Review of Bowls in the ACT Report
- ACT And NSW Gambling Legislation Relating to Community Clubs

→ Bowls ACT Membership and Participation Data

Bowls ACT Membership Statistics 2015-2021

2021

Club	<14	15-34	35-54	55-74	75+	Total
Belconnen Bowling Club	0	6	16	74	52	148
Bungendore Bowling Club	0	1	6	7	18	32
Canberra Bowling Club	0	5	18	49	81	153
Canberra North Bowling Club	0	6	14	69	66	155
Crookwell – Women’s	0	1	3	16	16	36
Crookwell Services Bowling Club	0	10	6	31	16	63
Goulburn Railway Bowling Club	0	2	8	50	24	84
Goulburn Railway Women's Bowling Club	0	0	2	34	13	49
Queanbeyan Bowling Club	0	7	21	77	37	142
Queanbeyan RSL Memorial Bowling Club	2	12	19	55	26	114
Tuggeranong Vikings	0	5	15	92	50	162
Vikings Bowls Club Inc	1	2	4	41	26	74
Weston Creek Bowling Club	1	8	17	53	48	127
Weston Creek Womens Bowling Club	0	4	5	18	26	53
Yass Bowling Club	0	10	34	36	50	130
Yowani Country Club Bowling Club	0	1	8	46	53	108
	4	80	196	748	602	1630

Commentary

→ *Based on the data provided by BACT, the 2021 membership breakdown is 980 members associated with ACT Bowls clubs and 650 associated with NSW Bowls clubs.*

*The value proposition BACT offers NSW clubs and their members needs to be strengthened over time. If this does not occur, and NSW based clubs were to re-affiliate with Bowls NSW, there would be only 6 Bowls clubs in the ACT (should Tuggeranong Vikings and Vikings Bowls club merge; and Western Creek Bowling Club and Western Creek Women’s Bowling club merge). This is a **very significant risk** facing Bowls in the ACT.*

2019

Club	14-	15-34	35-54	55-74	75+	Total
Belconnen Bowls	1	3	24	79	44	151
Bungendore	0	0	6	4	1	11
Bungendore Women's	0	0	0	5	3	8
Canberra	0	2	11	67	86	166
Canberra North	2	7	9	87	46	151
Goulburn Railway	0	3	8	53	37	101
Queanbeyan	0	3	22	71	21	117
Queanbeyan RSL Memorial	2	13	24	53	19	111
Tuggeranong Women	0	2	4	35	22	63
Vikings Lawn Bowls	0	4	19	82	41	146
Weston Creek	0	7	22	72	48	149
Weston Creek Women's Bowling Club Inc	0	3	10	16	22	51
Yass Bowling Club	0	5	29	21	13	68
Yass Women's	0	3	5	11	16	35
Yowani CC Bowls	0	4	10	48	55	117
Bowls ACT	5	59	203	704	474	1445
No DOB	108	Total Members				1553

2017

Club	14-	15-34	35-54	55-74	75+	Total
Belconnen Bowls	3	2	25	84	37	151
Bungendore	1	3	4	4	2	14
Bungendore Women's	0	0	0	1	2	3
Canberra	0	9	16	91	114	230
Canberra City Bowling Club	0	1	5	43	55	104
Canberra North	2	12	19	76	56	165
Queanbeyan New	0	4	26	72	28	130
Queanbeyan RSL Memorial	6	5	9	26	28	74
Vikings Lawn Bowls	0	1	16	58	59	134
Vikings Women	0	3	5	46	21	75
West Deakin Hellenic	0	0	0	0	1	1
Weston Creek	0	9	26	98	62	195
Weston Creek Women's Bowling Club Inc	3	3	13	26	18	63
Yass Bowling Club	1	3	27	24	14	69
Yass Women's	0	3	4	11	19	37
Yowani CC Bowls	1	6	12	71	71	161
Bowls ACT	17	64	207	731	587	1606
No DOB	89	Total Members				1695

2015

Club	14-	15-34	35-54	55-74	75+	Total
Belconnen	0	5	26	116	49	196
Bungendore	1	2	6	0	2	11
Bungendore Women's	0	0	0	1	1	2
Canberra	0	6	19	67	69	161
Canberra City Bowling Club	0	2	8	52	60	122
Canberra North	3	3	27	63	55	151
Queanbeyan	1	3	24	50	23	101
Queanbeyan RSL Memorial	0	4	7	14	10	35
Queanbeyan Women's Bowling Club	0	1	0	36	28	65
Vikings Lawn Bowls	0	5	28	73	44	150
Vikings Women	0	3	7	57	28	95
West Deakin Hellenic	0	0	0	2	2	4
Weston Creek	0	10	30	104	54	198
Weston Creek Women's	3	6	14	28	13	64
Yass Bowling Club	0	5	19	20	11	55
Yass Women's	1	0	5	13	16	35
Yowani CC Bowls	1	8	14	72	79	174
Bowls ACT	10	63	234	768	544	1619
No DOB	270	Total Members				1889

2021

ACT Population v BACT Demographics						
Age	14-	15-34	35-54	55-74	75+	Total
ACT Pop.	74,481	113,056	109,308	70,954	20,516	388,315
ACT %	19%	29%	28%	18%	5%	
BACT Pop.	4	80	196	748	602	1,630
BACT %	0.25%	4.91%	12.02%	45.89%	36.93%	
Diff	-18.94%	-24.21%	-16.12%	27.62%	31.65%	

Commentary

→	Based on the data provided, BACT membership has declined by 14% between 2015 and 2021 and 40% in the past 10 years . This clearly presents as a significant risk; particularly when affiliation and government grant revenue equates to between 80% - 90% of total BACT revenue annually.
→	In 2021, 5% of BACT membership was aged under 34 years; and 12% were aged between 35 and 54 years. These market segments presents as a clear growth opportunity for BACT membership. It would be interesting to know the age demographic of non-BACT member Bowls "participation" in the ACT (e.g. social Bowls competitions, Barefoot Bowls, etc).

Bowls Participation (4+ games) in Tasmania, Northern Territory and Australian Capital Territory, 2020-21

	Competition Participants			Social Participants			TOTAL Participants
	Pennant	Jack Attack/School Competitions	Total Competition	Barefoot	Other Social	Total Social	
Tasmania							
Hobart and South	1,393	398	1,791	1,312	5,175	6,486	8,278
Total Metropolitan Tasmania	1,393	398	1,791	1,312	5,175	6,486	8,278
Eastern Tasmania	157	40	197	160	718	878	1,074
Launceston and North	1,326	372	1,698	1,176	4,609	5,785	7,484
North-West Tasmania	1,009	287	1,296	880	3,380	4,259	5,555
Total Country Tasmania	2,492	699	3,191	2,216	8,706	10,922	14,113
Total Tasmania	3,885	1,097	4,982	3,528	13,881	17,409	22,391
Australian Capital Territory	771	294	1,065	1,248	2,813	4,061	5,126
Northern Territory	279	100	379	1,190	13,466	14,656	15,035

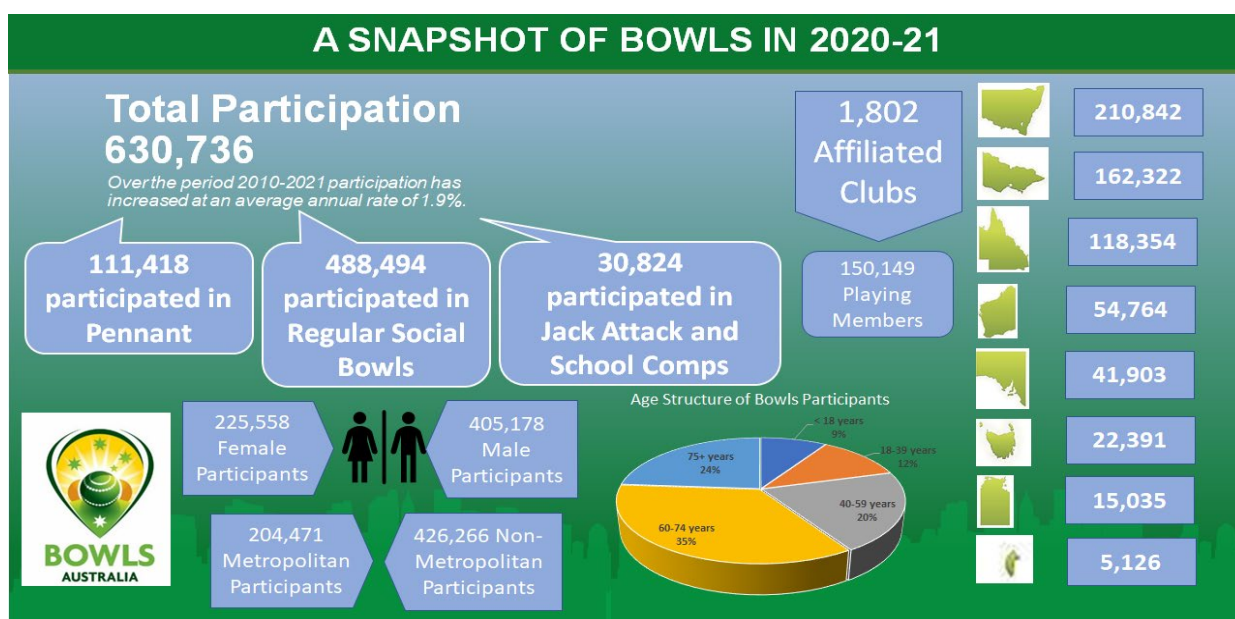
Commentary

→	<p><i>The table above summarises bowls participation by major segment.</i></p> <p>→ <i>Social bowls is now dominant in both Territories and Tasmania, with 97.5% of all bowls participation in NT, 79.2% in the ACT and 77.7% in TAS.</i></p> <p>→ <i>Male participation makes up 65.0%, 58.0% and 63.7% of all bowls participation in Tasmania, Northern Territory and Australian Capital Territory, respectively.</i></p> <p>→ <i>Bowls participation rates show the extent to which people in each age group and in each region are involved in bowls. The overall participation rate in the Australian Capital Territory was 1.04%, Tasmania was 4.14%, while the Northern Territory’s rate was 6.11%.</i></p> <p>Note: In the ACT in 2020/21 only 15% of total participants were pennant players.</p>
→	<p><i>The ACT population of 430,000, is comparable with that of Tasmania (540,000) and greater than that of the NT (246,000), yet Bowls competition members and total participation rates in the ACT are significantly lower than those in Tasmania and the ACT – Tasmania has approximately 5 times the number of competition players and 5 times the number of participants than the ACT; and the NT has 3 times the number of participants. The opportunity to achieve similar membership and participation rates and those in the NT and Tasmania (i.e. states / territories of comparable size to the ACT) presents as a strategic focus area of the highest priority for BACT and its member clubs.</i></p>

Commentary

→ Although the data above states there were approximately 4,000 social bowls participants in the ACT, the 2020/21 RUC annual report shows that the club sources \$288,000 from barefoot bowls participants (not including what these people spent on food, beverages or gaming). With the RUC charging \$20 per person to play barefoot bowls, this equates to over 14,000 barefoot participants in the 2020/2021 financial year for this club alone. BACT working with clubs to implement strategies which allow clubs, BACT (and BA) to capture every bowls participant presents as a **key opportunity**.

→ BA National Membership and Participation Census



The 2021 National Bowls Census was the tenth undertaken. It was the second compiled entirely from data collected in the Bowls Australia CRM, BowlsLink platform and Sporting Schools databases with input from Bowls Australia's team, especially Regional Bowls Managers. This is a significant enhancement on previous censuses which were compiled through collaborative input of Bowls Australia staff, State and Territory Bowls Associations and surveys of bowls clubs around the nation.

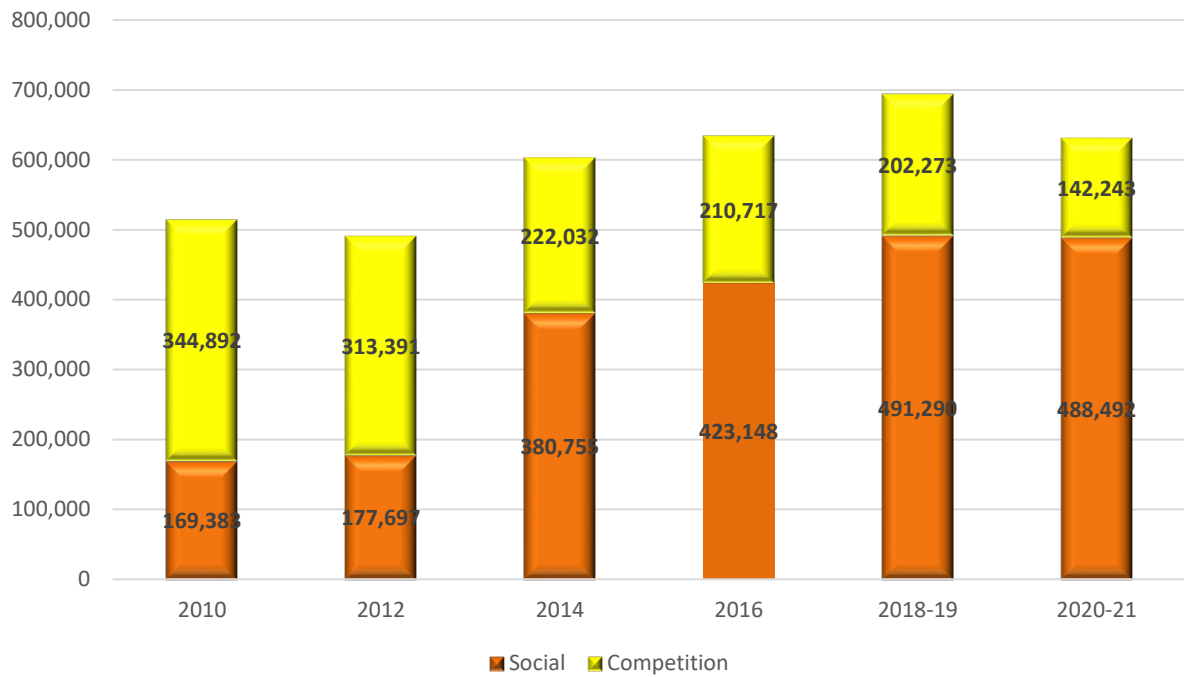
The 2020-21 Census results were compiled from the participation data of 66% of all clubs nationally and scaled to provide estimates for 100% of clubs.

Some Key Findings

Formal, or registered playing membership of bowls clubs has been decreasing for more than 30 years, at the rate of 3.5% per annum on average. The most recent decrease was 7.2% (between 2019-20 and 2020-21).

Decreases in formal membership of bowls clubs have been offset by **growth in social participation** in bowls; a function of Australia's time poor population. Growth in flexible formats for social bowls has also had a strong impact on the age structure of bowls participants.

Participation Trends: Competition and Social Bowls, 2010-2020/21



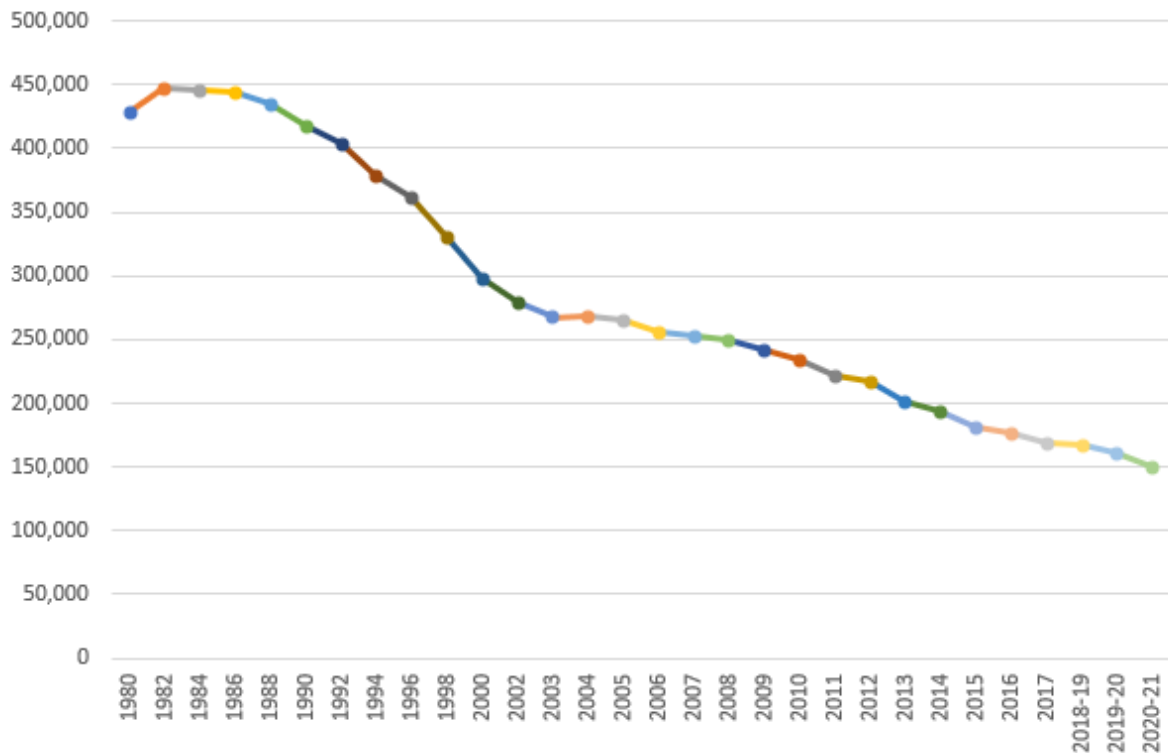
Commentary

→ *The downward trend in club pennant players and the increase in social bowlers has been clear for many years across Australia. How BACT and its members clubs (and BA) work together to ensure the future financial and operational sustainability of the sport’s delivery system in the ACT (i.e. BACT and clubs), will be key for the future of Bowls in the ACT.*



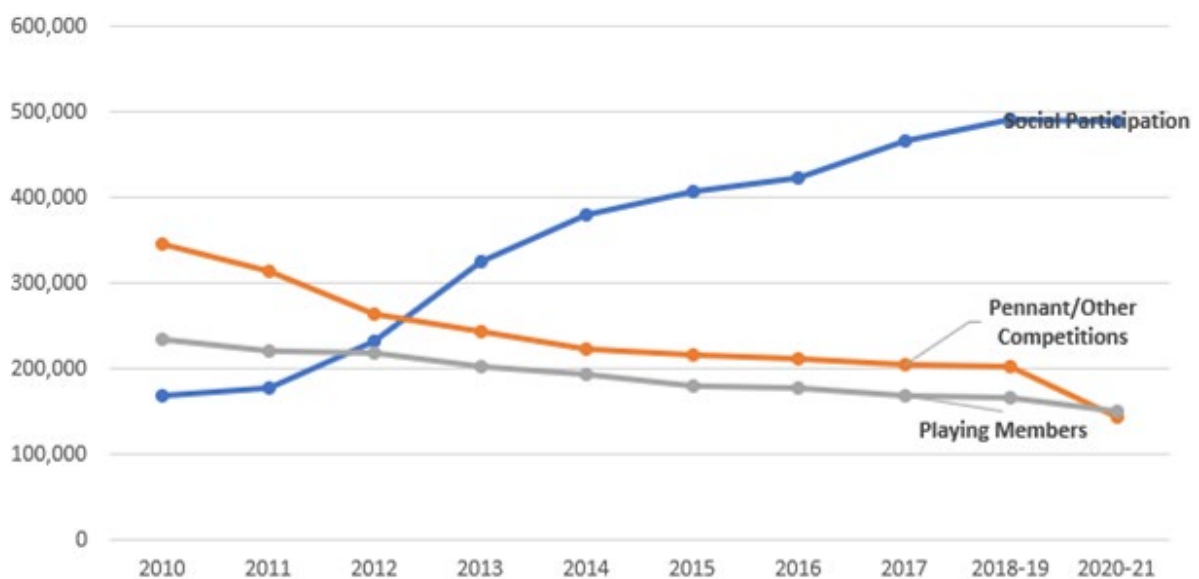
The following infographic shows that formal, or registered, Bowls playing membership has decreased progressively across Australia since 1980. ***Playing members of Bowls clubs nationally in 2020-21 were only 35% of those registered in 1980.*** Over this same period (1980-2021) the Australian total resident population has increased by 75%, from 14.69 million to 25.70 million, at an average annual rate of 1.4%.

Player members of Bowls clubs 1980-2021



Whilst Playing memberships have decreased nationally very significantly over recent years (by 40% in the ACT the past 10 years), *social participation has increased – in some cases very significantly*. This shift in the consumption of Bowls represents an opportunity for ACT and Region Bowls clubs to future proof their business models and capitalise on this growing market segment.

Bowls membership and participation nationally 2010-2021



→ Strategic Facility Review of Bowls in the ACT Report (RSM – June 2021)

The following section provides a number of direct excerpts from the Report, along with a number of MSC commentaries relating to this information.

About the Review

The key objective of the Review was to provide operational insights of ACT clubs with lawn bowls facilities, to deliver a report with financial sustainability analysis, club membership trend analysis, Bowls ACT membership model analysis, and current and future demand analysis for bowls greens. **Note:** the review (funded by ACT Government) did not incorporate a review of the 7 x Bowls ACT affiliated clubs situated in NSW.

The review combined financial analysis, membership analysis, and economic/market insights of ACT bowls clubs to provide in-depth recommendations for future sustainability and potential future directions for ACT bowls clubs.

This report discussed the complex arrangements between clubs in the ACT, and made reference to several different club types. The following table outlines the relationships and governance arrangements between Host Clubs, or those entities that own and manage the facilities, affiliated bowling clubs; and Bowling committees who access the facilities and provide bowls related member services.

	Bowling Facilities Owners	Bowling Clubs	Committees	Relationship / Context
Licensed Community Clubs	 Yowani Country Club	–	Yowani Bowling Club Committee	Standalone club with a Bowling committee who organises events and supports players. Members are Bowls Members of Yowani Country Club.
	 The Vikings Group	Tuggeranong Vikings Mens Bowls Club Tuggeranong Valley Women's Bowls Club	–	The mens and women's bowls clubs are affiliated clubs with The Vikings Group. Members are members of Vikings and members of the respective mens and women's clubs.
	 The Canberra Labor Club	 Weston Creek Bowling Club and Weston Creek Bowling Club (Womens)	–	The mens and women's bowls clubs are affiliated clubs with The Labor Club. Members are members of The Labor Club and members of the respective mens and women's clubs.
	 The Canberra North Bowling and ACT Rugby Union Club "The RUC"	–	 Bowling Management Committee	Merged club with a bowling management committee. Members are Bowls Members.
Licensed Bowls Clubs	 Belconnen Bowling Club	–	–	Standalone entity Members of the Belconnen Bowling Club
	 Canberra Bowling Club	–	–	Standalone entity Members of the Canberra Bowling Club

Key Findings

Lawn Bowls is a sport that has a long legacy in Canberra, with greens built as early as 1924 and many more facilities and clubs opening as the city grew and expanded. However, almost a century later, the sport is facing an uncertain future. There are substantial market pressures affecting all clubs namely rising costs, declining memberships and revenues, which impact the viability of individual clubs. The bowls “market” is undergoing a contraction and facilities and clubs are consolidating, a trend which is forecast to rapidly increase over the coming decade. Without intervention, we are likely to see more facilities and clubs close.

Yet, bowls is a sport that once “discovered”, is loved by its players. The sport provides a competitive team experience for people who may no longer be fit or agile enough to play football or cricket, and is a valuable source of social connection for older people.

The importance of what bowls provides to the Canberra community cannot be overstated, and there would be a significant detrimental impact on activity rates in older Canberrans if bowls was not taken up by, or made available to the next generation. To not have lawn bowls would severely diminish recreational and sporting opportunities in Canberra.

There is no “magic bullet” solution to solving the issues that bowls faces. No one stakeholder will be able to achieve it on their own - it will require an industry wide collaborative effort. With the right strategies and changes many clubs will be able to navigate through these challenges. It will require strong leadership and a dedicated and enthusiastic effort from members and players to change the face of their clubs and the sport to adapt to and welcome the next generation.

The average age of a bowls member in the ACT is 69, with 58% of members having played for more than 11 years. ***Clubs have a small window of less than five years before memberships drastically decline as long term members exit the sport due to advancing age and declining physical capability.*** How bowls clubs are able to navigate, survive, and thrive for the future will depend largely upon the club’s and the sport’s ability to do two things. First, evolve to attract younger players and members, and second, resolve fundamental issues in their underlying business models to enable sustainable revenue sources which can fund the maintenance of bowls facilities and activities.



Core Challenges Facing the ACT Bowls Community

- Bowls Clubs are facing increasing competition and increased pressure on revenues and overhead costs. Many ACT clubs are affected by a long term decline in electronic gaming machine (EGM) revenue, which previously underwrote facilities maintenance costs.
- Licensed bowls clubs with fewer than 20 EGMs, are no longer able to rely on EGM revenue as a sustainable, or reliable income to underwrite facility maintenance. These smaller scale clubs are impacted by a combination of factors compounded by the small size and scale of their operations.

There is a significant shift in consumer preferences for different styles of game play, or completely away from electronic gaming due to increased awareness of gambling harm. Also contributing to declines in EGM revenue is a decline in club membership numbers and a lack of consistent reinvestment to modernise the EGM fleets. Moreover, the ACT Government has reduced the number of machines authorised in the ACT, and while Clubs with smaller numbers of machine authorisations were exempt from requirements to surrender machines, some have still availed themselves of the opportunity to raise capital through accessing Government incentives for the surrender of gaming machine authorisations, further reducing the number of EGMs.

For larger Community Licensed Clubs, such as The Vikings Group, or The Labor Club, the ACT Community Contributions scheme is largely driving the spend on facility maintenance for facilities owned by these larger “host” clubs. The Community Contributions Scheme is used to underwrite the costs of facilities maintenance for their respective bowls facilities. The amount that can be used to invest in maintenance is calculated on a proportion of EGM revenue, which has declined to a point that is significantly below the costs of facilities maintenance at a site level.

The recent clarification and amendments to the rules governing the ACT Community Contributions Scheme is of concern to all clubs. However, the changes hide a more significant underlying issue – that the scheme has acted largely as a proxy for subsidising bowls facility maintenance. As the amounts claimable under Community Contributions decline, the larger community clubs are finding it challenging to continue to justify to their broader membership, costs to maintain an asset (bowls greens) that is not used by the majority of the broader membership. Using the scheme as the core justification for funding facility maintenance has left bowls facilities being considered generally unprofitable and unable to generate revenue in their own right.

Commentary

→	<p><i>How Bowls clubs can work with their host clubs to significantly increase the percentage of the host club’s broader membership, which use the Bowls facilities and transform the bowls facility into a revenue generating and profitable asset for both host clubs and Bowls clubs, presents as a key opportunity.</i></p> <p><i>The RUC is an example of this – i.e. approximately \$280,000 was sourced in the 2021 financial year directly via barefoot bowls participation fees of \$20 per person, per game.</i></p>
---	--

- Where clubs have merged with larger entities, the difference in purpose between a bowls club and the broader community club (facility owner) will continue to create challenges, and place facilities at risk of closure. The governance and structural working arrangements between host club or facility owner (e.g. Vikings or Labor Club) and the affiliated bowls clubs (e.g. Tuggeranong or Weston Creek Bowls Club) create barriers to the organising and management of the sport as a business opportunity, developing bowls as a sport, and building membership and participation in the sport. The facility owner incurs the costs for facility maintenance while the affiliated bowls clubs earn the revenue from players.
- Revenue streams that have previously underwritten facilities maintenance are in decline, while maintenance costs have continued to increase. In addition to EGM revenues, the key sources of revenue for bowls clubs are membership and greens fees. The decline in lawn bowls memberships have resulted in less membership and greens revenue to fund maintenance costs.
- Clubs reported that that they are constrained by limited assets and capital, combined with a strict regulatory environment to develop diversified commercial revenue opportunities on their existing sites. Concessional leases, and the lease variation charges levied when trying to develop commercial opportunities, do not provide the flexibility for Clubs to independently develop new commercial opportunities that would enable them to completely shed their reliance on traditional club revenues such as gaming and alcohol. At present, Clubs are unable to source sufficient capital to independently redevelop their sites and must engage land developers or larger clubs who are not vested in bowls facilities. In recent times, every small Bowls Club's engagement with a land developer, and most engagements with larger licensed community clubs, has resulted in the closure of the bowls facilities and the club. Clubs should remain responsible to the community for the advantages that a concessional lease provides, but future planning strategies should consider how to enable diversification away from gaming and alcohol businesses and develop innovative, alternative, community-based approaches to commercial revenue raising.

An example is the Enoggera development in Brisbane. Pickering Place in Enoggera, Brisbane, is a \$12 million initiative that represents a significant departure from the traditional "club" model of bowls facilities, with *no gaming machines located on site*. The original bowls club has been redeveloped into a mixed-use recreation and retail centre, offering dining/cafe facilities for visitors and bowlers as well as health services, recreation and community activities, and retail shops. The club redeveloped the site using a different approach which includes a mix of commercial, recreational, and community facilities that feature:

- Two story sports centre faces two undercover international standard
- Bowling greens.
- A combination of sports and recreation facilities are co-located on site, including the Enoggera Bowls Club, 9 Degrees Brisbane (bouldering), X Golf, My First Gym (movement and fitness for young children), and Healthy Connections Plus (Pilates studio).
- The area also includes indoor and al fresco dining at "Café 63".
- Tradelink and Beaumont Tiles provide retail outlets on site.
- Bowls Queensland is also located on site.

- Bowls Clubs are facing a significant decline in membership and players. This is the most significant and immediate problem that Bowls Clubs face and must be addressed if the sport is to survive and thrive. Declining memberships are driving declining revenues and diminishing clubs' capability to adapt to the changes required to attract new members. ***As of 2019, 0.36% of ACT people play bowls. This is compared with a national rate of 3.16%.***
- Facilities are underutilised, with the benchmark member to green ratio of 90/1 sitting at 63/1. Increasing membership rates will improve individual clubs' ability to fund facility maintenance out of existing fees and reduce the pressure to increase fees for members.
- Without a strategy to grow participant numbers the sport will continue to decline and is likely to halve again in the next 5-10 years as current members age out of the sport. The average and median age of players across ACT Clubs is between 68 and 72 years of age.
- Broader trends in sporting engagement indicate that shorter games, less time commitments, and more flexible, casual play is preferred. While this has to be balanced with the role that elite level, national and international pennant, and championship competition plays in the sport, the legacy of structured club competitions and long form traditional games needs to make room for current trends by adding shorter competition formats such as "Jack Attack" to the mix of activities offered by clubs.
- Bowls ACT faces ongoing and sustained reluctance and price sensitivity from members and clubs when setting appropriate membership or capitation fees to resource the sport at all levels appropriately.

Commentary

→	<p><i>The saying, "never let a good crisis go to waste" comes to mind when digesting the situation the sport of Bowls in the ACT presently finds itself in. For significant change to occur, the ACT Bowls community (i.e. BACT, with the support of BA; host clubs; Bowls clubs; ACT Government; bowlers; and other partners will only need 2 things:</i></p> <ol style="list-style-type: none"> <i>1. Sufficient awareness of the drastic need for change; and</i> <i>2. Sufficient intent to do the work needed to make change happen.</i> <p><i>It is hoped the Fit-4-Future Purpose Clubs project, and subsequent Implementation Strategy, will provide the ACT Bowls community with the level of awareness and intent needed to ensure a sustainable and thriving future for Bowls in the ACT.</i></p>
→	<p><i>In 2014, the Canberra North Bowling Club merged with the ACT Rugby Union Club to become the RUC. The RUC had 155 Bowls members in 2021. However, in the same year, the RUC reported an income directly associated with Barefoot Bowls fees of \$288,000. With Barefoot Bowls fees being \$20 per person, per session, this equates to 14,400 individual visitations / Barefoot Bowls experiences in 2021. This is a brilliant example of a club commercialising a contemporary, socially focused Bowls offering, engaging large number people in Bowls participation and optimising facility usage. Other clubs could and should learn from this example, even though they may not have the location advantages the RUC has.</i></p>

Commentary

→	<p><i>This Paper has already mentioned the Enoggera example of a Bowls club, which underwent a significant re-development to include a range of commercial tenants and updated Bowls facilities, and how this redefined business model (which does not include EGMs) is proving successful.</i></p> <p><i>There other examples of such initiatives across Australia, which demonstrate innovative business models which do not include, or rely on EGM revenues, including the Devonport Country Club – a merger of two bowls clubs and a golf club in regional Tasmania, which does not include EGM revenue in its business model.</i></p>
---	--

→ Retaining the current level of bowls facilities would be a significant advantage to the ACT community. However, facilities are managed predominantly by community clubs, and there are structural and significant financial pressures across the industry that will continue to place pressure on clubs to reduce costs.

Fundamentally the business model that relies on gaming revenue to subsidise and underwrite the costs of bowls is no longer sustainable. The business models that underpin bowls need to change, and include commercial and sustainable sources of revenue.

2019 membership data indicates a total of 1,067 participants in the sport of bowls. This is across 6 ACT clubs, who have a total capacity (based on greens utilisation) for 1,620 members. Current capacity utilisation is currently 65.8%. ***We anticipate that cost pressures will drive consolidation and reduction in this excess capacity.***

Well planned consolidation will ultimately benefit the sport as it will lead to a consolidation of resources and spread fixed costs across a greater number of players. Capacity utilisation would be increased to 79% by a reduction of 3 greens or consolidation from 6 to 5 clubs. Ultimately the consolidation plan should lead towards establishment of covered synthetic bowling facilities that will facilitate and encourage night-time play, as well as improving player comfort in winter and summer. An indoor capacity will have a higher capacity allowing for expansion of the sport with the comparable facilities maintenance costs.

Observations from interstate clubs illustrate that high quality facilities rejuvenate interest and participation in bowls. Examples such as Merimbula and Deer Park demonstrate how providing a quality, covered sporting facility turns around a club in decline. Additionally, co-locating bowls with other sporting and recreational opportunities assists with costs and facility management. Brighton Bowling Club and Traralgon are examples of indoor bowls facilities which provide indoor play, all weather, and all year round.

Importantly, these clubs employ dedicated (paid) bowls coordinators to organise games and events and greens have high utilisation with daily, weekly, and nightly events.

Commentary

→	<p>Affiliated BACT clubs' appetite for consolidation will be tested during the consultation phases of this project.</p> <p>An example of where a Bowls club has considered consolidation, but decided against it, is that of the Belconnen Bowls club – refer to an excerpt from the club's 2019/20 annual report.</p> <p>In 2019 RSM Consultancy was contracted by Active Canberra to ascertain the ongoing viability and future of the Belconnen Bowling Club (BBC). Two key recommendations were put to the club: 1. Trade our way out – the Club retains its independence by restructuring the Board and core areas of the entire business. 2. Amalgamate with another club – a merger that would ensure legal protections for the bowling club, its members and its facilities.</p> <p>A merger sub-committee was formed in August 2019 to seek initial discussions with potential partners and to define the objectives required. Seven ACT Clubs responded to the merger expression of interest – Magpies; Belconnen Soccer Club; Belconnen Labor Club; Canberra Southern Cross Club; ACT Basketball Association; Belconnen Raiders; and Rugby Union Club. The two most interested clubs were Magpies and Belconnen Soccer Club. Talks with the different clubs included how both parties could benefit from an amalgamation.</p> <p>Issues such as Lease arrangements, Governance, Finance, Upgrading of BBC facilities and restraints around these areas were discussed. It appeared that the motivating factor for some was the possibility of acquiring assets cheaply. BBC also approached the owner of the adjoining tennis court land, to ascertain if they had any interest in a joint development. After some initial interest they did not consider the matter economically worthwhile.</p> <p>Constraints around BBC Crown Lease and Business Activity included:</p> <ol style="list-style-type: none">1. BBC Concessional Crown Lease expiry was 6th February, 2023. Some Clubs were hesitant that the BBC lease was due to expire in just over 3 years. The lease has since been renewed for 50 years.2. The Community Facility [CF] Lease and Zone allow for a range of concessional community businesses to be activated on site, however such businesses [residential care, childcare, gym] would require BBC or a merger partner significant investment and possibly the loss of one green.3. Deconcessionalised Lease – Under amalgamation with another club, a new business entity could be formed [new name, new governance, new board] with the Bowls Club interests [greens, programs and members] protected by legal arrangements similar to RUC. However such proposed commercial activity to bring in funds for both BBC and a merger partner would require a Lease Variation charge.
---	---

Constraints impeding potential mergers

<p>→</p>	<p><i>Further impediments to a potential merger were:</i></p> <ul style="list-style-type: none"> <i>a) BBC’s old wooden clubhouse that was very run down.</i> <i>b) Shrinking membership.</i> <i>c) Prohibitive cost of converting kitchen to commercial operation.</i> <i>d) Small number of Gaming Machine licences.</i> <p><i>These lease constraints as well as the need for substantial investment by a partner to upgrade BBC facilities were impediments to a successful merger at the time.</i></p> <p><i>The Bottom Line – Despite the best efforts of the sub-committee, no firm merger offers were forthcoming. The exercise however was not fruitless. The club made some valuable networking contacts with other industry / club bodies and enjoy goodwill with neighbouring Clubs, particularly the Belconnen Soccer Club, Magpies, RUC, The Southern Cross Club [Mr Ian McKay- CEO], who kindly offered any assistance that the BBC may require.</i></p> <p><i>It is the sub-committee’s recommendation that the work involved has been worthwhile and should be kept aside if other BBC Boards decide to revisit these issues.</i></p> <p><u>Note:</u> <i>In preliminary discussions with members of the Project Reference Group, it appears as though the club Board has successfully initiated a number of strategies designed to enhance the stand-alone viability of the club. The impact of these strategies and plans for additional ones, will be explored in future stages of this project.</i></p>
<p>→</p>	<p><i>Although one of the key impacts on the sustainable operations of various Bowls clubs in the ACT and Region is identified as decreasing revenues sourced from EGM associated revenues (e.g. community contribution scheme funds), there does appear to be preliminary evidence of some clubs undertaking non-EGM focused revenue generating activities successfully. These will be explored in future states of the Review.</i></p> <p><i>It is also interesting to note how the business models of Bowls clubs in other states and territories differ from those currently in the ACT and Region. For example, the vast majority of the 511 Bowls Victoria affiliated clubs are not attached to a licenced host club and do not access EGM related revenues; and there are many examples of clubs in Victoria operating very sustainably business models.</i></p> <p><i>BACT and its affiliated clubs working together to focus on the opportunities associated with implementing new structures and activities to future proof the business models of clubs (and BACT) and in doing so, future proof the sport in the ACT and Region, must be the mindset focus, as opposed to these parties looking at the problems currently being faced by the Bowls delivery system / their club. The sport needs to look ahead, rather than the rear vision mirror!</i></p>
<p>→</p>	<p><i>Bowl clubs being able to fund paid Bowls coordinators and/or partner with commercial providers to deliver participation programs, which will grow Bowls participation and the revenues associated with this, should be a core focus of all clubs who are serious about significantly growing the Bowls elements of their business.</i></p>

→ With the exception of the RUC and Yowani, Host Clubs such as The Labor Club and Tuggeranong Vikings have used the community contributions scheme as the main reason for justifying continued financial support for the maintenance of bowls facilities, in spite of the lack of revenue and poor cost recovery earned from the greens themselves.

The Vikings Group estimates that facilities cost \$210,000 to maintain, which offsets a significant amount of the \$350,000 in community contributions for the entire Tuggeranong site. The Labor Club estimates that the investment in greens facility maintenance is approximately \$200,000 which is substantially higher than the Community Contributions obligation to provide \$78,000 for Weston Creek Bowls club.

All host clubs expressed a general good will and strong intent to support their affiliated bowls clubs, however most do not consider greens a revenue opportunity or a core business driver and raised the issues of high and increasing maintenance costs. While community contributions provide a means of justifying the support, it was clearly communicated to RSM that it was only community contributions that enabled the continued financial support and maintenance of greens facilities. Now that host clubs are facing broader economic and financial pressures, affiliated bowls club membership is declining, and contributions are declining in line with EGM revenue, host clubs are finding it increasingly difficult to justify Bowls related costs to the business. Simply, if the gap between facilities maintenance and community contributions continues to widen, then those host clubs are more likely to divest themselves of the greens facility assets in the future.

Commentary

→	<p><i>ACT Clubs who operate EGMs are required under the Gaming Machine Act 2004 to make community contributions from the revenue earned from the use EGMs. Access Canberra regulates and monitors club compliance on behalf of the ACT Gambling and Racing Commission. The minimum community contribution rate for clubs has been increased from 8% to 8.8% of net gaming machine revenue (NGMR) as of 1 July 2019.</i></p> <p><i>By way of comparison, in NSW anything over \$1 million NGMR, the Club is required to contribute 1.85% to the NSW equivalent of the ACT Community Contributions Scheme, via Club Grants. Of the 1.85% a club can apply to use 20% of the 1.85% towards upkeep of Bowling / Golf surfaces, expenditure etc.</i></p>
---	---

Future Demand – Act Bowls Club Membership Forecast 2020-2040

Population Increases: The population in the ACT is forecast to increase at a rate of around 1.8% p.a. This will see the population aged 65+ almost double from 55,410 people to 90,463 people.

Membership Declines: Since 2009, the rate of total bowls memberships in the ACT has declined at the average rate of around 100 bowls members per year. In member numbers, this is a decline from 1,649 members to 1,067 members in 2019. ***As a proportion of total members, this is an average decline of 6.74% p.a.*** The participation rate in the population of bowls members is 0.25%, with the decline representing 0.03% each year on average. This is a dramatic decline and is in opposition to the rising population. Please refer to teal line in the graph (below) which ***estimates at the current rate of decline, Bowls membership in ACT clubs could be zero by 2035.***



The membership forecasting is scenario-based and three individual scenarios are included in the analysis below with an attempt to illustrate the significant impacts on the forecasting results when making different assumptions. The results of the membership forecasting over the period from 2020 to 2040 are illustrated below by scenarios:

Bowls Membership Forecasting 2020-2040

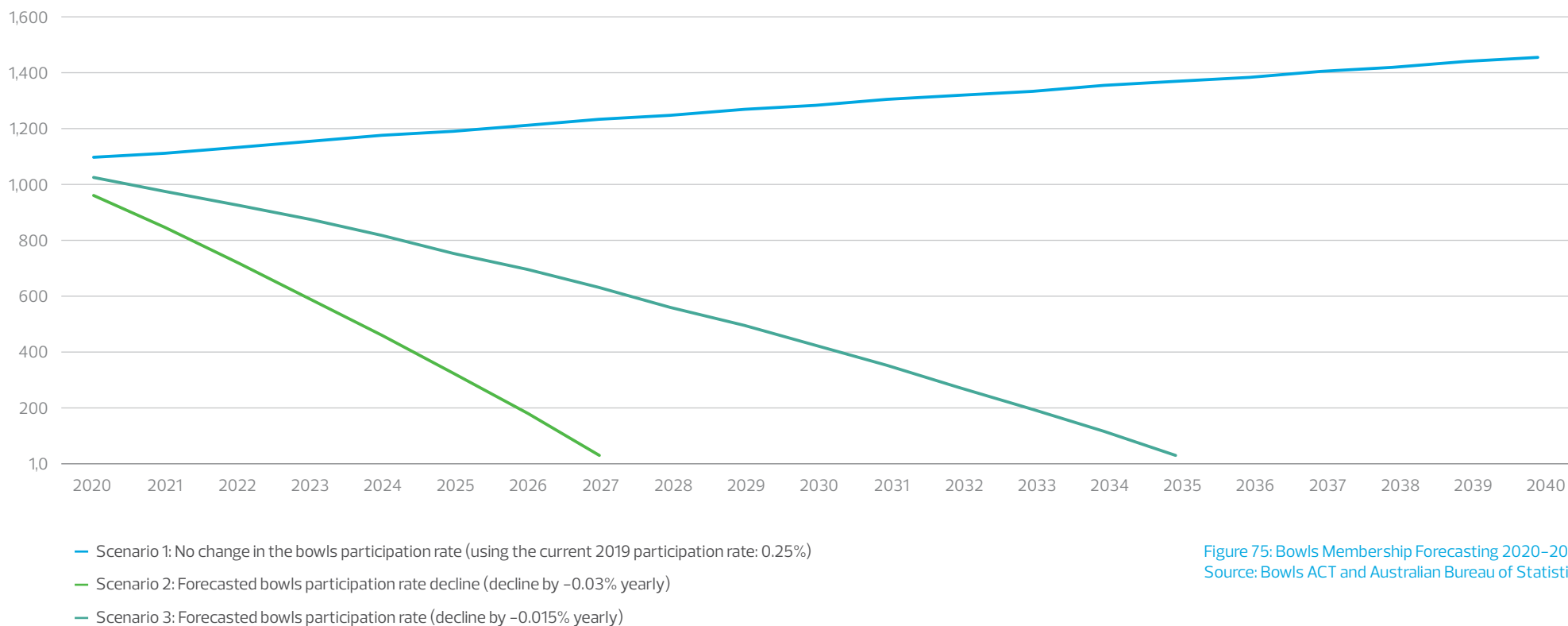


Figure 75: Bowls Membership Forecasting 2020-2040
Source: Bowls ACT and Australian Bureau of Statistics

Key Recommendations

- 1. INCREASE MEMBERSHIP AND PARTICIPATION RATES TO NATIONAL AVERAGE.** The membership base of bowls needs to be rebuilt across all clubs to substantially increase bowling participation rates across the ACT. It is critical to attract the next generation of players into the sport by modernising clubs, facilities, and the game.
- 2. RESTRUCTURE AND DIVERSIFY CLUB BUSINESS MODELS AWAY FROM TRADITIONAL CLUB REVENUES.** Clubs should redefine and adopt new business models that do not rely on EGM revenues and the Community Contributions Scheme to fund facilities maintenance. Facilities owners will need to refocus effort on making the bowling facility more self-sustaining. At the same time, increasing bowling participation amongst all club members will improve the perception and value of these facilities to the broader club membership. Host clubs and affiliated bowls clubs can redefine their relationships so that revenues and costs can be shared between both entities. Smaller standalone clubs can reduce their reliance on EGM revenue.

Clubs should prioritise facilities maintenance in the disbursement of fees. Fees for all forms of the game should contribute to greens maintenance. Where bowls clubs are affiliated with larger community clubs, an appropriate portion of fees for greens maintenance should be disbursed to the facility owner. Clubs should also implement consistent processes to apply fee increases consistent with economic inflation such as applying annual CPI to membership fees and wage price index to greens fees.

Clubs should restructure fees to build more stable revenue, while facilitating payment terms that support new and ongoing members. The average player pays across membership, greens fees, and competitions fees in excess of \$1,500 per annum to play, excluding travel expenses. Changing the fee structure to golf fee model – claiming the majority of these expenses through membership fees, with fortnightly small direct debit payments, and correspondingly reducing greens fees to minimal levels would mean that revenue could be better managed and deployed to fund greens maintenance.

Fees for all forms of the game should contribute to greens maintenance. A tiered structure would continue to provide low fee options for pensioners, and may provide limited use options e.g. “barefoot” bowl style membership for social players.

- 3. INDEPENDENT AND SMALLER CLUBS REQUIRE FINANCIAL AND MATERIAL SUPPORT TO DEVELOP ASSETS AND FACILITIES.** Smaller, independent, licensed bowls clubs should leverage existing grant opportunities, such as the Diversification and Sustainability Support Fund or capital grants, to build executive and organisational capability to strategically steer and fund diversification and re-development opportunities. The focus should be on building long term, sustainable, commercial club revenue streams, rather than divesting parcels of land for capital raising initiatives.

The ACT Government should encourage innovation in the diversification and re-development of bowls facilities and investment in the development of multi-use and multi-purpose sporting and recreational precincts, with consideration for balancing commercial viability and community purpose.

- 4. CLUBS MUST SUPPORT BOWLS ACT TO REBUILD ITS REVENUE BASE THROUGH GROWING MEMBERSHIPS ACROSS THE ACT.** Bowls ACT must develop, grow and diversify its revenue base. Revenue is based on club memberships, and with a declining number of members, the underlying foundations and capability of Bowls ACT to provide peak body services to clubs will continue to erode. Opportunities include incentivising club membership growth, diversified competitions, cross sector partnerships. Industry level sponsorships may provide limited incremental revenue. Clubs must actively embrace and support Bowls ACT in these initiatives, investing club resources and effort to achieve collective success.

→ **ACT And NSW Gambling Legislation Relating to Community Clubs**

ACT

[Gaming Machines in the ACT](#) outlines in detail, legislation as it pertains to EGMs in the ACT, which is relevant to all BACT affiliated clubs located in the ACT.

Following in an excerpt from the Parliamentary and Government Agreement – 10th Legislative Assembly ACT

Reducing harm from gaming while supporting sustainable clubs

The ACT Labor and Greens Government recognises that community clubs play an essential part in the social life of many Canberrans, as a meeting place and sponsor of community events. We want to ensure clubs continue to support the community, while introducing and strictly enforcing measures to further reduce harm from gaming. To do this, we will:

1. Establish a Community Clubs Ministerial Advisory Council with government, industry and unions to build a long-term, sustainable clubs sector in the ACT;
2. Target a further reduction in the number of electronic gaming machine licences in the ACT to 3500 by 1 July 2025, and support this through the introduction of incentives for Clubs to consider, including additional incentives to move to zero machines within a venue location.
3. Establish a rigorous, across-venue self-exclusion regime across the ACT for people experiencing harm from gaming, with significant penalties for breaches. This exclusion regime will align with or exceed reforms currently progressing in NSW to allow exclusion by family members;
4. Match or exceed any further harm reduction gaming reforms commenced in NSW, such as cashless gaming;
5. Introduce the harm reduction measures of \$5 bet limits and \$100 load-up limits following a thorough review and transitional plan to manage impacts on clubs, particularly smaller clubs that upgrade machines less regularly. A staged rollout of this reform should commence by the end of 2022 at the latest;
6. Facilitate planning and other processes to allow clubs to diversify to other revenue generating streams, particularly development of available land for social housing and land supply purposes, that are supported by the community.

NSW

[Gaming Machines Act 2001 No 127 - NSW Legislation](#) outlines in detail, legislation as it pertains to EGMs in NSW, which is relevant to all BACT affiliated clubs located in NSW. Other information can be accessed via [ClubGRANTS - Liquor & Gaming NSW](#) and [Apply for an exemption to the in-kind limit - Liquor & Gaming NSW](#)

Broad Comparison between ACT and NSW

- ACT Clubs who operate EGMs are required under the Gaming Machine Act 2004 to make community contributions from the revenue earned from the use of EGMs. Access Canberra regulates and monitors club compliance on behalf of the ACT Gambling and Racing Commission. The minimum community contribution rate for clubs has been increased from 8% to 8.8% of net gaming machine revenue (NGMR) as of 1 July 2019. By way of comparison, in NSW anything over \$1 million NGMR, the Club is required to contribute 1.85% to the NSW equivalent of the ACT Community Contributions Scheme, via Club Grants. Of the 1.85% a Club can apply to use 20% of the 1.85% towards upkeep of Bowling / Golf surfaces, expenditure etc.

- The ACT Gaming Regulatory environment has undergone more than 20 significant changes since the enactment of the Gaming Machine Act 2004. A range of measures have been introduced in the ACT to tackle gambling harm and to establish a tighter gaming regulatory environment. Some of these changes are detailed below. Note: These changes, highlight the growing disparity between the ACT and NSW environments, in relation to the provision of gaming and community contributions associated with net gaming machine revenue in both jurisdictions.

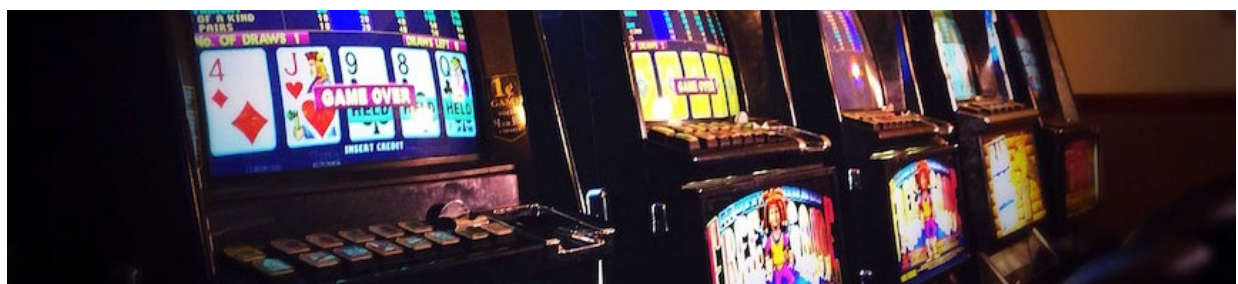
A brief summary of recent changes to the ACT Gaming environment and how these compare with the NSW environment, include (but are not limited to):

- A prohibition on gaming machine advertising outside gaming machine areas (this does not exist in NSW)
- Limitations on the display of gaming machine signage (NSW does allow some advertising e.g. you will see VIP room signs at pubs and clubs, however pubs and clubs in NSW do have the same outside signage restrictions as the ACT);
- Limits on note acceptors to \$20 (no limits in NSW)
- A requirement for responsible gambling information to be displayed in every gaming venue (this also applies to NSW)
- Self-exclusion programs (this also applies to NSW)
- Licensee led exclusions – i.e. a licensee can exclude a person (this does not exist in NSW)
- Restrictions on 24-hour gaming (In NSW, late night trading after midnight is allowed)
- Restrictions on inducements and food and beverage service to gaming areas (NSW allows drinks to be served to the machine)
- Requirements for gaming machine licensees to provide information to players, such as messaging on gaming machines (this does not exist in NSW)
- Requirements for large winnings (over \$1500) to be paid by cheque or via EFTPOS (NSW allows cash payouts of up to \$5,000)
- Mandatory staff training (this does not exist in NSW)

- Prohibition on alfresco gaming (permitted in NSW. Alfresco gaming equates on average, to 60% of venue gaming turnover).
- Prohibition on cash facilities (ATM or EFTPOS) in gaming area (this also applies to NSW)
- ATM cash limit restrictions to a maximum withdrawal of \$250 per card per day (no restriction in NSW)
- EFTPOS cash limit restriction to a maximum withdrawal of \$200 per transaction with a requirement to record the withdrawal of two transactions or more in ACT Government incident reporting system (EFTPOS for cash is not widely used in NSW but it is allowed)
- Gaming machine numbers were reduced by 1000 in 2019
- Bigger penalties introduced for breaches of the *Gaming Machine Act* and a new obligation for club directors to reduce gambling harm (this also applies to NSW)
- Clubs are required to publish their annual reports and disclose their contributions this also applies to NSW).

Commentary

→	<p><i>There are currently approximately 5,200 EGMs in Canberra, with the ACT Government committing to a reduction in this number to 3,500 by 1 July 2025. Currently in NSW, there are approximately 96,000 EGMs. Current ACT figures equate to an EGM : person ratio of approximately 1 : 76; compared to current NSW figures of approximately 1 : 85.</i></p>
→	<p><i>There is a significant difference between the community contributions associated with net EGM revenue in the ACT (i.e. 8.8%) and NSW (i.e. 1.85% for gaming revenue over \$1 million). The larger amounts of money being provided to ACT Bowls clubs who are attached to licenced clubs with EGMs, in comparison to NSW clubs, is likely to have contributed to an overreliance by ACT Bowls clubs on this revenue stream and a lack of innovative operational and diverse commercially focused activities as a result.</i></p> <p><i><u>Note:</u> In other states and territories, the vast majority of affiliated Bowls clubs are stand-alone clubs, with no association with licenced clubs and no EGM revenue. In these instances, clubs have needed and continue to implement non-gaming related activities, designed to fund greens maintenance and all other club operations. Many of these clubs are thriving!</i></p> <p><i>To thrive in a changing future, BACT clubs (perhaps with a particular focus on ACT clubs), will need to stop <u>expecting and depending on revenues sources via EGMs</u> and initiate business models and associated activities which allow them to significantly increase revenues from more diverse streams – i.e. Bowls clubs need to be self-sustainable without EGM community contribution funds and consider any such funds they do receive, as a bonus, not a core revenue stream.</i></p>



2.4 Bowls Australia Strategic Positioning

- Bowls Unleashed 2022-2025 - Bowls Australia Strategic Plan
- BA Governance and Operating Structure
- National Services Model
- National Participation Census 2021
- BA Membership Model
- BA Strategy Framework

- Bowls Unleashed 2022-2025 – Bowls Australia Strategic Plan

BA has engaged MSC to develop the BA 2022-25 Strategic Plan. A snapshot of the draft version of the plan, which is **yet to be endorsed by the BA Board**, is presented below.



BOWLS UNLEASHED 2025!

MORE PEOPLE – PLAYING MORE BOWLS – MORE OFTEN!

BOWLS UNLEASHED 2025 provides the blueprint for how Bowls Australia (BA) will **collaborate with purpose** with our State and Territory Associations, clubs and other key partners to future proof BA and the sport of Bowls, as we drive towards 2025 – and beyond.

Our Vision: For all Australians to engage with Bowls during their lifetime.

Our purpose: To future proof Bowls: **MORE PEOPLE CONNECTING WITH BOWLS – IN MORE WAYS – MORE OFTEN!**

Our values: Our values define our character and guide *how we behave when it matters most*, as we strive to have more people – playing more Bowls – more often!

Care – We passionately care about the thriving future of our sport and the people within our Bowls community.

Accountability – We do what we say we will do, when we say we will do it. We do what is right for Bowls – always.

Respect – We value everyone within the Bowls community and what they can bring to the future of our sport.

Excellence – We embrace change, have a growth mindset and strive to be better tomorrow than we are today.

OUR PLAN ON A PAGE

Our strategic priorities



Underpinned by our enablers



Commentary

<p><i>MSC has also been engaged by BACT, BWA, BSA and BV to develop STA specific 2022-2025 strategic plans, which will align with and compliment the BA plan in areas of mutual benefit, whilst also ensuring state specific needs and prioritised.</i></p>

→ BA Governance and Operating Structure

- BA (a company limited by guarantee) is governed by a 9-person Board.
- BA’s governance (and operating) model is supported by the following Board committees, Working Parties and Advisory Groups:
 - State Consultative Committee *(27 members made up of some BA directors, and the Presidents and CEOs/EOs of all STAs)*
 - Risk, Integrity and Policy Committee
 - Audit and Finance Committee
 - CEO Performance and Remuneration Committee
 - Nominations Committee
 - World Bowls 2023 Committee
 - National Officiating Advisory Group
 - National Coaching Advisory Group
 - National Selection Panel
 - BPL Management Committee
 - Hall of Fame Committee
 - National Club Development and Participation Advisory Group
 - National Merchandising Program Advisory Group
 - BowlsLink Steering Committee
 - Women in Bowls Working Party
 - National Governance Reform Working Party
 - Technology and Systems Working Party
 - National Bowls Centre Advisory Group
 - National Marketing Advisory Group
 - Environmental & Sustainability Advisory Group
 - Affiliation Fee Review Panel
 - National Diversity and Inclusion Working Party (cultures, gender, all abilities, mental health)
 - Bowls in the Olympics Advisory Group
- BA’s current staffing structure, as presented on the [BA website](#), sees a total of 39 staff (a mix of full-time and part-time), working across four operational units – Bowls Operations; High Performance; Commercial Operations; and Operations.

Commentary

→	<i>BA and STAs are currently working on the development of a proposed National Bowls Roles and Responsibilities Framework, designed to clearly articulate the key roles attached to BA, STAs, clubs and other elements of the sport’s delivery system. Ensuring that this framework aligns with the 2022-2025 BA strategic plan and the 2022-2025 strategic plans of the STAs who have committed to the “nationally aligned strategic framework, requires close consideration.</i>
→	<i>BACT being aware of an accessing all available support from the BA via its human and financial resources should an area of focus as BACT activates the implementation plan for come from this Fit-4-Future Clubs project.</i>

→ National Services Model

A strategic project within Bowls Unleashed (2020-2022) is to “develop and implement a shared serviced model for STAs”. A map of the national shared services landscape as of Oct 2021, is presented below.

Area	Service/Program	BA	STAs
Communications and Marketing	BPL (also above)	Yes	WA and TAS. Shared marketing elsewhere.
	The Bowls Show, Without Bias	Yes	Tailored TBS in WA
	National Marketing Campaign	Yes	Some STAs have utilised
	Live Streaming	Yes (mainly nat. events)	NSW has own. WA used SEN. VIC used BA and others. QLD used GCT. SA used other. TAS own.
	Graphic design services	Yes (avail. to Clubs)	Available to STAs
Sponsorship / Licensing	National Merchandise Program	Yes	Supported by STAs
	Partners	SEN (for production)	Own

Area	Service/Program	BA	STAs
Finance	Reporting, Budgeting, Audit, Payroll, AR/AP	Can provide support	Each STA has own system
People & Culture/HR	Recruitment and retention, position descriptions and general advice	Yes	NSW, VIC, SA, NT have engaged BA. Others own.
	Performance management	Yes	A few STAs.
Legal	Whole of sport and specific advice	Yes (used by some STAs and is avail. to Clubs)	Each STA generally has own, albeit some use of BA counsel
Research	Research projects to gather evidence e.g. Census	Yes	Available to STAs

Shared services landscape

Area	Service/Program	BA	STAs
Development & Participation	Regional Bowls Managers/Club Development Support	Yes	Shared (VIC have additional Part. staff)
	Participation Programs	Yes	Varying use. VIC and SA have additional programs.
	Facilities / LGAs	Yes	Some STAs have staff with expertise
	Retirement and Lifestyle Villages	Yes	No
Education and Training	Coaching	Yes	Shared (+ Committees), VIC have additional staff
	Officiating	Yes	Shared (+ Committees)
	Development & Volunteers	Yes	Shared
	BowlsLearn - Self-paced training	Yes	Shared

Area	Service/Program	BA	STAs
Governance	BA Board, CEO, some Admin	Yes	Shared. Split EO/RBM in NT.
	World Bowls, Sport Aus, CGA, Government Advocacy	Yes	Shared
	Policies & Laws	Yes	Shared
	Strategic Planning	Yes	Each STA has a plan with alignment with BA
BowlsLink/IT	Websites	Yes	Shared
	Membership, Competition, Event Management, RinkBooker	Additional cost to STAs	WA, VIC, SA, TAS, ACT, NT, NSW
	BowlsLink Scoring & Bowls Now Apps (in development)	Yes	To be shared
	General IT support / servers	Own	Own



Area	Service/Program	BA	STAs
Events	National Events – <u>Aust Open</u> , <u>Aust Indoors</u> , The Nationals, BPL Cup	Yes	Shared (incl. <u>Aust Indoor Qualifiers</u>)
	STA Events – Pennant(s), State Champs, Carnivals/ <u>Ctry.Weeks</u>	n/a	All STAs have own
	Awards / Hall of Fame	Yes	NSW, VIC, SA have own events
	BPL (also a shared marketing exercise)	Yes	WA and TAS. Shared marketing elsewhere.
High Performance	National Coaches & Teams	Yes	Shared
	State/Pathway Coaches	Yes	In all STAs – NT to come.
	World Champs, <u>Comm Games</u> , Training camps	Yes	Shared

Commentary

→	<i>Clearly, significant and positive steps in the national services space have been taken in recent years. Continuing to optimise efficiencies across the national Bowls delivery system presents as an ongoing opportunity. This excerpt from the President and CEO’s report within BA’s 20/21 Annual report reflects this position well, “Personally, we are encouraged by the improving level of communication and trust between STAs and BA. There is still room for improvement and whilst we may have different priorities and responsibilities, we can collectively share resources, ideas, successes and failures. We can give honest feedback maturely and with the intention to build, not tear down. It must be a priority to look for ways to make the sport more relevant and exciting for the next generations”.</i>
→	<i>BACT continuing to work with BA to optimise the benefits BACT can receive via accessing national services should be a priority.</i>

→ BA Strategy Framework

Bowls Unleashed (2017-2019 and 2020-2022) included several *Strategy Development Projects*, the vast majority of which appear to have been effectively delivered, and are now in the implementation phase. Strategies reviewed as part of the document review element of this project include:

- Digital Strategy
- Facility Strategy
- Sustainability Strategy
- High Performance Strategy
- National Bowls Centre Strategy
- Women in Bowls Strategy

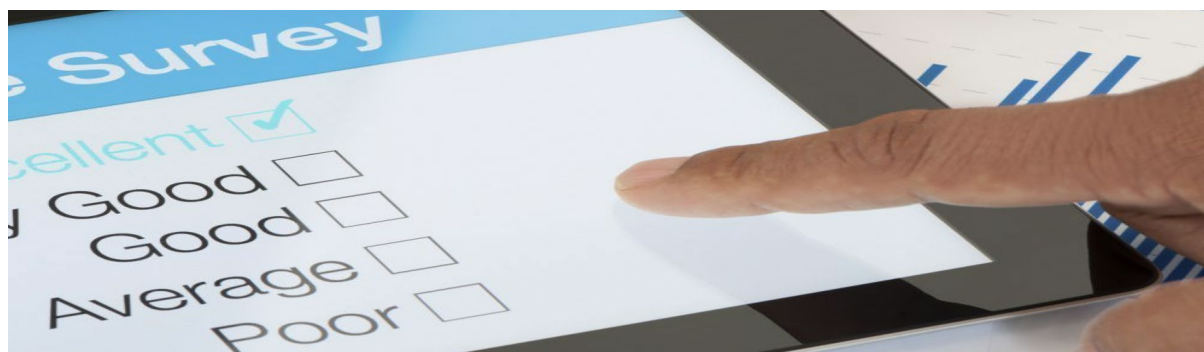
Commentary

→	<i>The BA Strategy Framework, which supports the delivery of the broader Bowls Unleashed Strategic Plan, is comprehensive and well designed. The impact these Strategies are having in the ACT, and the potential need for the development of additional national Strategies which can be delivered locally in the ACT, will be explored within this Project, as well as during the Bowls Unleashed 2022-2025 strategic planning project.</i>
---	---

Section 3: Club Survey Findings Summary

Project Stage 4 of the Fit-4-Future Purpose Clubs project involved MSC developing a specifically designed e-Survey, with the purpose of gathering preliminary information from club stakeholders during the early stage of the Review.

In total, 35 e-Surveys were completed from 13 of Bowls ACT's 16 affiliated clubs. A summary of responses is presented in this section.



Fit-4-Future Purpose Clubs Project - Club Survey

In your role as a as a Board / Management Committee Member, which Bowls ACT affiliated club are you responding on behalf of?

BACT Affiliated Club	Responses
Belconnen Bowling Club	0
Bungendore Bowling Club	1
Canberra Bowling Club	1
Canberra North Bowling Club	2
Crookwell – Women's	0
Crookwell Services Bowling Club	1
Goulburn Railway (Men's) Bowling Club	4
Goulburn Railway Women's Bowling Club	6
Queanbeyan Bowling Club	1
Queanbeyan RSL Memorial Bowling Club	1
Tuggeranong Vikings	6
Vikings Bowls Club Inc	5
Weston Creek Bowling Club	3
Weston Creek Women's Bowling Club	3
Yass Bowling Club	0
Yowani Country Club Bowling Club	1

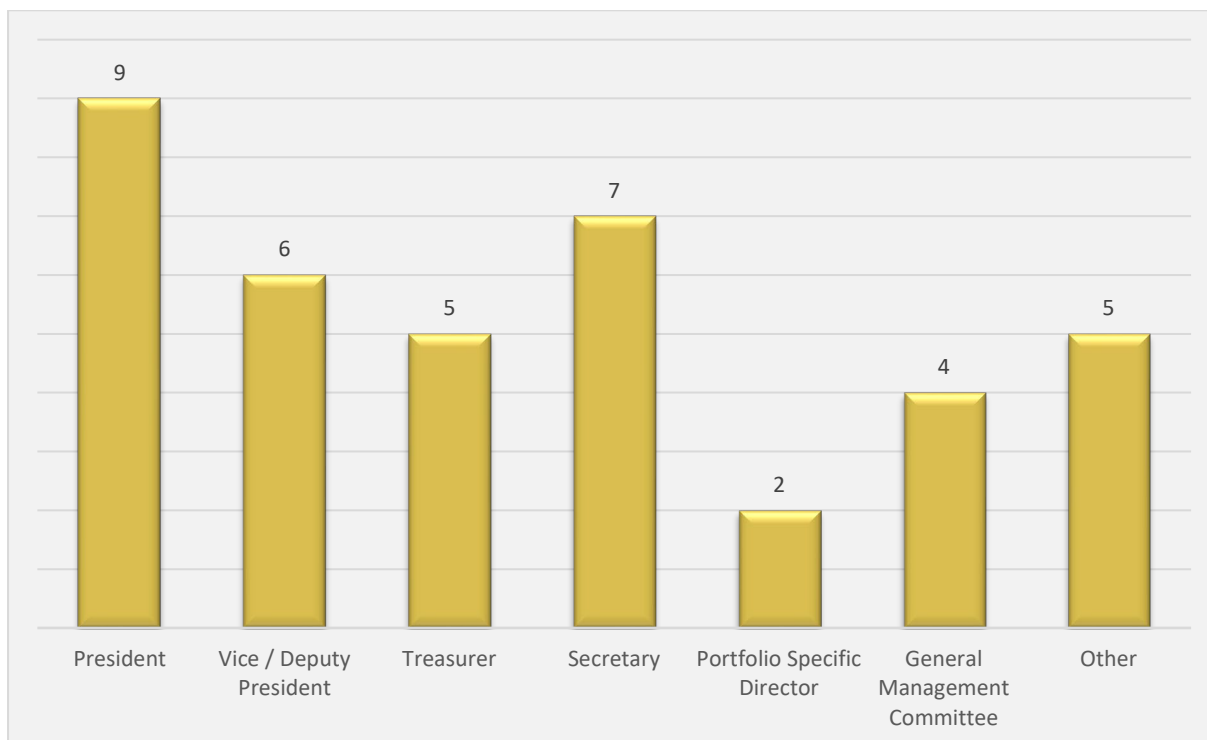
Answered: 35 Skipped: 0

Commentary

→ Importantly, significant progress has been made in relation to merging clubs, where currently there are separate men's and women's clubs, with amalgamations imminent:

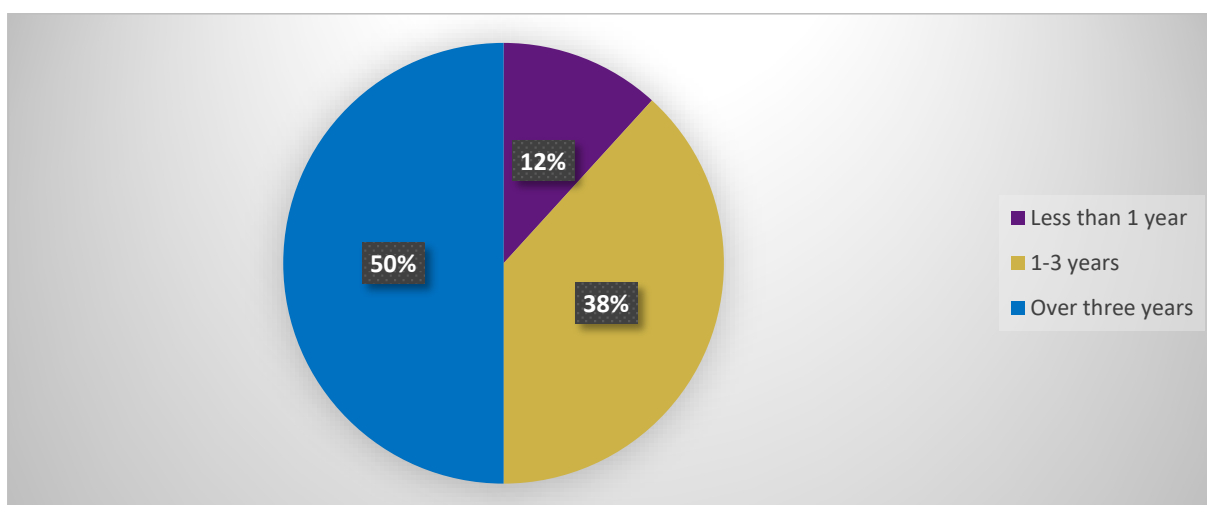
- Goulburn Railway (Men's) Bowling Club + Goulburn Railway Women's Bowling Club
- Tuggeranong Vikings + Vikings Bowls Club Inc
- Weston Creek Bowling Club + Weston Creek Women's Bowling Club

Which role/s do you currently fill on your club's Board / Management Committee?



Answered: 35 Skipped: 0

How long have you filled a Board / Management Committee role for your club?



Answered: 34 Skipped: 1



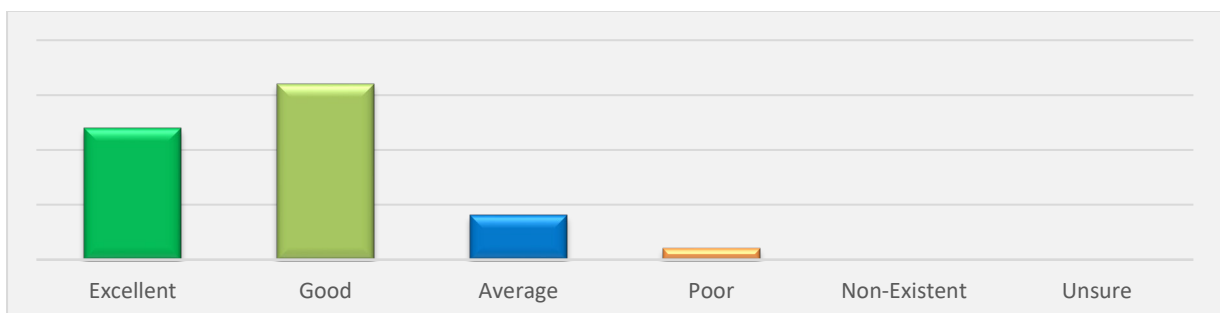
11 of the 13 BACT affiliated clubs who completed the survey are aligned with / supported by a licenced host club ...

Could your club operate sustainably without the support of its licenced host club?



- **YES = 12%** (4 / 33 responses)
- **NO = 70%** (23 / 33 responses)
- **UNSURE = 18%** (6 / 33 responses)

If relevant, rate the relationship your club currently has with its host / licenced club.



Answered: 33 Skipped: 2

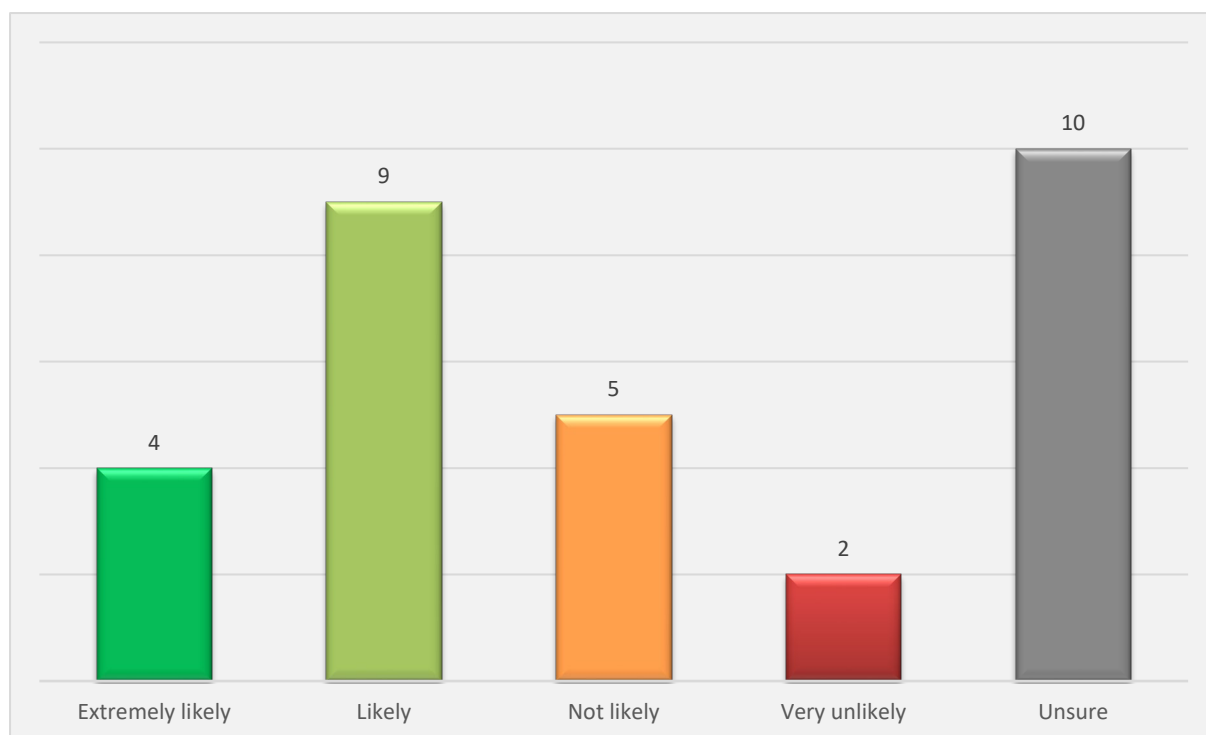
Does your club employ staff (i.e. not staff who are employed by the host club) and / or have any significant commercial partners?

BACT Affiliated Clubs (who completed an e-Survey)	Staff (Full Time / Part Time)	Significant Commercial Partners / Sponsors
Bungendore Bowling Club	Yes – Part Time	-
Canberra Bowling Club	Yes – Full Time	-
Canberra North Bowling Club	-	-
Crookwell Services Bowling Club	-	Yes
Goulburn Railway (Men's) Bowling Club	-	Mixed Responses
Goulburn Railway Women's Bowling Club	-	Yes
Queanbeyan Bowling Club	-	Yes
Queanbeyan RSL Memorial Bowling Club	-	-
Tuggeranong Vikings	-	Mixed Responses
Vikings Bowls Club Inc	-	Mixed Responses
Weston Creek Bowling Club	-	-
Weston Creek Women's Bowling Club	-	Mixed Responses
Yowani Country Club Bowling Club	-	-

Commentary

→ 11 of the 13 clubs who completed the survey stated they do not employ staff (i.e. any staff in place are employed by the Host club).

Without significant change to your club's business model and/or activities, how likely is it that it will still be a growing and financially sustainable club in 10 years' time?



Answered: 30 Skipped: 5

<i>Summary of comments</i>	
→	The survival of our bowling club is more dependent on growing our membership and not on our business model which is the under the control of the Labor Club.
→	Because of current location and demographic in the area the Club will definitely not grow.
→	Declining participation will eventually lead to the facility being unviable.
→	Our future is totally dependent on the licensed club, which owns the infrastructure and meets most of the outgoings required to maintain the club. If this assistance was withdrawn then our club would go out of existence.
→	The two Vikings bowls clubs are now taking steps to amalgamate. This will assist our parent club to potentially access ACT Government grants to assist with funding for bowls club improvements. In addition proposed structural changes to both Vikings and the bowls clubs will enhance bar, meal, entertainment and bowls facilities. Plans to commence construction is late 2022.
→	We are very dependent on the host club for facilities, otherwise our membership numbers are declining slowly so we need to boost interest in bowls in the regions we service.
→	The Yowani Country club redevelopment project is intended to provide long term financial security to both its bowls and golfing activities.

Commentary

→	<i>The high number of respondents who stated that, without significant change to their club's business model and/or activities, it is "not likely" / "very unlikely" / "unknown" if their club will still be a growing and financially sustainable club in 10 years' time is a very significant concern.</i>
---	--

What is your club's biggest strength?

<i>Summary of response themes</i>	
→	International sized greens and good facilities.
→	Our club's biggest strength is the location and the fact that it offers a "complete package". Lawn bowls followed by the ability to have a drink and/or meal on the premises.
→	Its active and committed members.
→	<ul style="list-style-type: none"> - It's tradition of strong results. - Bowls performance. For a membership of about 50 we have excellent results in Pennant and Bowls ACT Competitions as well as a good number of players in the ACT representative squad and sides.
→	Cost management and business acumen .
→	Access to good facilities, competitively successful and a good social environment.
→	Support from the licensed club allows membership and playing fees to be set at levels that are affordable to most players, including aged pensioners, of whom we have a large cohort.
→	Financial backing from our Host club.
→	Our membership is growing at a time other clubs are losing members and it is largely due to the willingness of the club to accept players of all abilities, to provide them with free coaching and support.
→	That we are amalgamating the Women's and Men's clubs.

What is the biggest risk / barrier to the future growth and prosperity of your club?

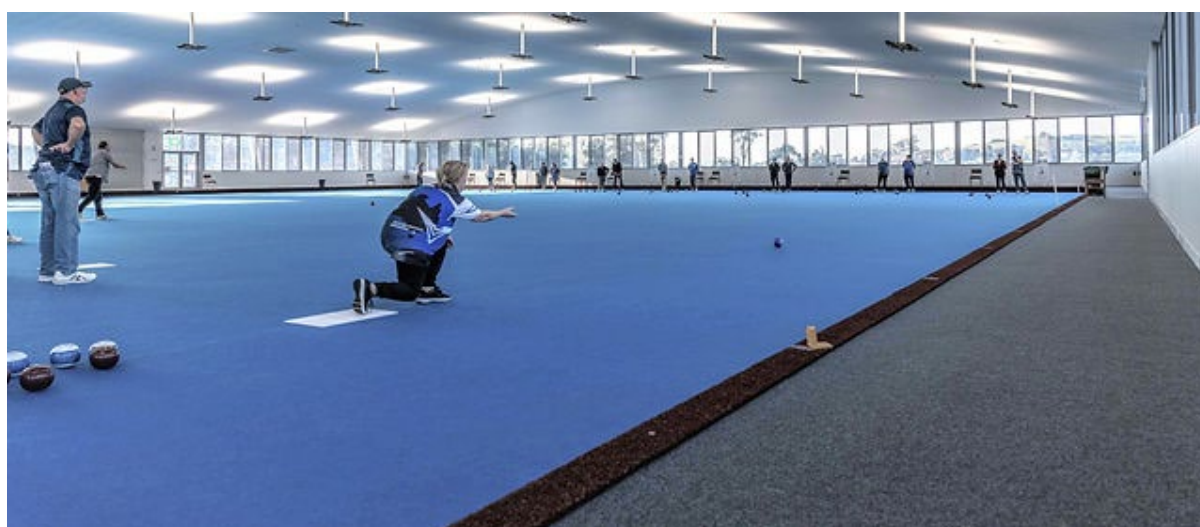
<i>Summary of response themes</i>	
→	<ul style="list-style-type: none"> - Host club ceasing support or passing over costs of maintaining greens to bowlers. - Withdrawal or significant reduction of support from the licensed club that is presently provided. - We will be unable to continue to operate without the financial support of the Vikings Group. - Licenced club need for financial sustainability. - Loss of financial support from licenced club. - Our dependency on the Host club. Without the facilities we don't exist. However, even with the cooperation of the Host club we are only able to access the greens when the Host club is open and persons under 18 need to be signed into the club and supervised by a Host club member at all times. making it difficult to bring through players under 18. - We rely on our Host club to provide and maintain our greens. The Host club is currently planning a redevelopment of the whole club property, which will see us lose one green. We will gain two synthetic greens, possibly covered, which the RSM report thought was needed in the north and south of Canberra.
→	<ul style="list-style-type: none"> - The age of the current members and the inability to attract younger bowlers. - Biggest risk is the aging population of the club members and the impact that will have on our ability to remain a going concern. - Living in the past - not working toward the future.
→	<ul style="list-style-type: none"> - Lack of members. - Falling membership numbers and participation.
→	Living in the past - not working toward the future.
→	The traditional committee structure of the club (and likely all other clubs) is not conducive to changing business models.
→	Ageing population, excluding 2 members of the Executive, our membership is 70 years plus. We have members who are enthusiastically working well into their 80s, of course this will eventually cease.
→	Our present location.
→	The club itself isn't at much risk, unless barefoot bowls dropped off dramatically in popularity; and the management is looking to further diversify revenue streams anyway. The actual bowling group (i.e. we are one with our Host club and have a Bowls committee which managed competitive bowling) might be at some risk if numbers of members fell away because of the age.

Commentary

→	<p><i>The greatest risk facing the bright future of Bowls clubs is seen to be the potential withdrawal of Host club support (i.e. facility ownership and maintenance). Although this is the case, it was mentioned previously in this Paper that there appears to be a level of complacency by some clubs, who have been / are depending on Host clubs' EGM community contribution scheme allocations.</i></p> <p><i>It must be a priority for Bowls Clubs to work proactively in partnership with their Host clubs (where this is the case) to drive business activity for the Host club and the Bowl club, via Bowls activities.</i></p>
---	---

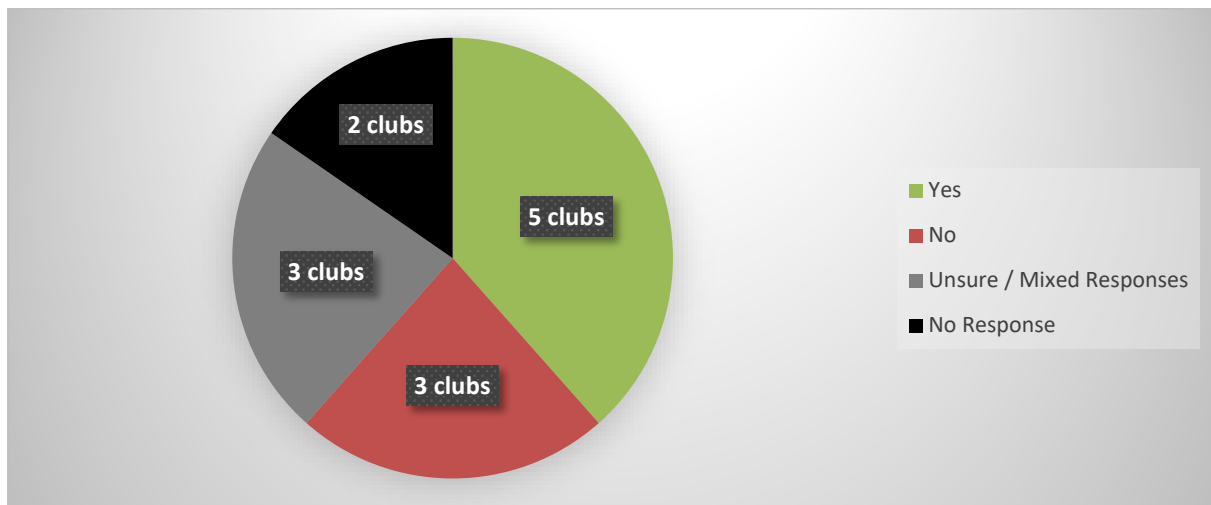
What is the biggest opportunity your club should be taking advantage of in the coming 3 years?

<i>Summary of response themes</i>	
→	<ul style="list-style-type: none"> - Amalgamating the Men's and Women's clubs to combine resources, and streamline expenses, work together to increase our playing membership, etc. - Amalgamation and remodelling of the club by host club to attract more members in a variety of game formats.
→	Grants to enable covered synthetic greens for year round play for both local and interstate tournaments and corporate bowls.
→	<ul style="list-style-type: none"> - To try and capitalize on the surrounding workers to participate in a faster, fun game of bowls. The long sessions are not suitable to young workers with families. Time is very precious. - Barefoot bowls modified bowls tournaments. - The club needs to proactively engage with any initiatives undertaken by BACT to increase participation rates and attract new members who will participate in more formal bowls activities such as pennants club championships. - Opportunities provided by Bowls ACT to run social competitions.
→	Growing population.
→	Relocating and incorporating other sports at the new site.
→	<ul style="list-style-type: none"> - By agreement with the licensed club, and financial support from them and the ACT Government, remodel to become an all year round playing facility, enclosed and climate controlled. - Fully enclosed, climate controlled facilities capable of hosting events in all weather conditions and over more hours per day would be a once in a generational change. The opportunities for more tournaments (some possibly Bowls Australia sponsored), as well as more time for other competitions as well as a more comfortable environment should not be overlooked. - Vikings are planning major changes at Tuggeranong, which could provide our bowling club with the opportunity to host major events, including National Championships, BPL finals etc. if we can get our greens enclosed in an all-weather facility. - Expanding to a purpose built indoor bowls facility.



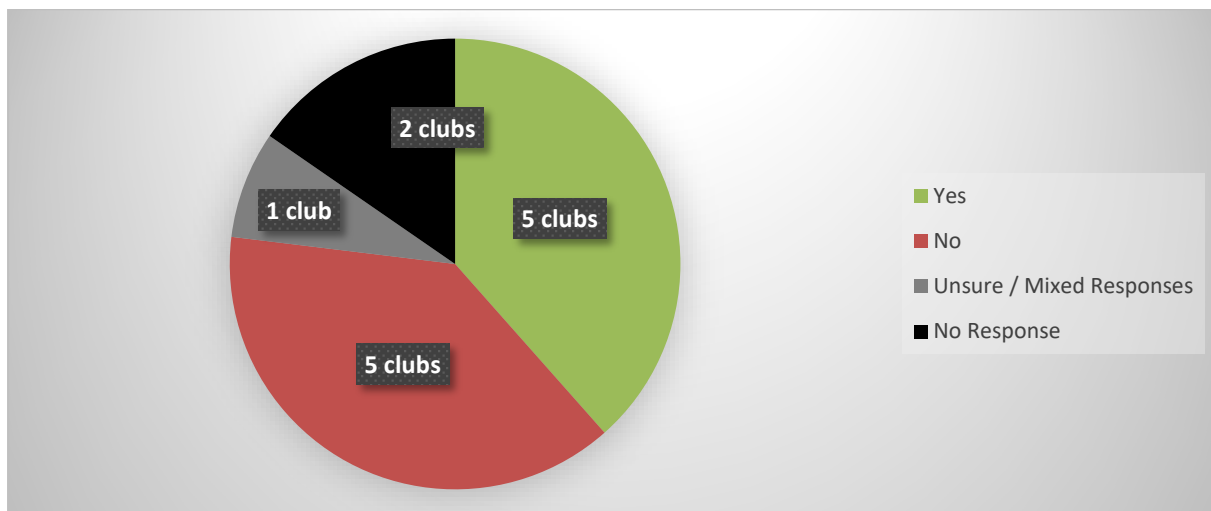
Indoor Facility at the Devonport Country Club, Tasmania

Does your club have a current strategic plan?



All 13 clubs who completed the e-Survey are represented in this graph

Does your club have a current commercial strategy which focuses on how it will diversify its revenue sources, increase revenue and increase its financial sustainability?



All 13 clubs who completed the e-Survey are represented in this graph

Commentary

→ Only 5 of the 13 clubs who responded to the survey state their club has a strategic or commercial plan in place.

Bowls clubs securing their future, and that of the sport of Bowls in the ACT and Region, won't happen by chance. The opportunity for BACT to work with Bowls clubs and Host clubs to develop club specific strategic plans which align in areas of mutual benefit with the soon to be developed 2022-2025 BACT Strategic Plan (and support clubs in their implementation and monitoring) needs prioritisation.

Due to the very different circumstances the various BACT affiliated clubs are in, and their different goals, a "one size fits all" approach to the planning and operational support BACT provides its clubs is not advisable.

What are your club's top priorities for the coming 2-3 years?

<i>Summary of response themes</i>	
→	Membership increase. However, it is unclear how this can be achieved.
→	Retain our club's relationship with the Host club.
→	Merging of men's and women's clubs.
→	Surviving
→	Relocating and building fully enclosed synthetic greens
→	No priorities
→	You need to talk to the Host club about this.

Commentary

→	<p><i>For BACT affiliated clubs to significantly increase their "membership", which is currently largely focused on competitive / pennant players, there will need to be a shift in what it means to be a member and a shift in what metrics are used to measure the success of Bowls clubs. As mentioned on multiple occasions throughout this Paper, traditional / pennant membership has decreased year on year nationally since 1980 and has decreased by between 40% - 60% in the ACT in the past decade (depending on the data sets used). Clubs expecting to double, triple or quadruple the number of traditional pennant players in the next 5 years is not a realistic goal, nor is it one which should be prioritised over other elements of club business.</i></p> <p><i>Clubs would be well serviced to take the strategic position that "all Bowls is Bowls and everyone can be a bowler". The participant, not just the pennant player, should be at the heart of the design and delivery of club activities ...</i></p> <p style="text-align: center;"><i>The future of Bowls is not what it used to be!</i></p>
---	---

80% of respondents feel their club is proactively working to significantly increase membership and 69% of respondents feel their club is proactively working to significantly increase social participant numbers

- ✓ The majority of respondents (89%) believe their club has access to the **GREENS SPACE** needed to significantly increase **club membership** (29 responses from 11 clubs).
- ✓ The majority of respondents (96.5%) believe their club has access to the **GREENS SPACE** needed to significantly increase **social participation** (29 responses from 11 clubs).





Although clubs are apparently prioritising membership and participation growth (and have the green space to enable this) only 3 respondents stated their club is currently delivering a Bowls Australia participation program (either Jack Attack or Rookie Rollers)

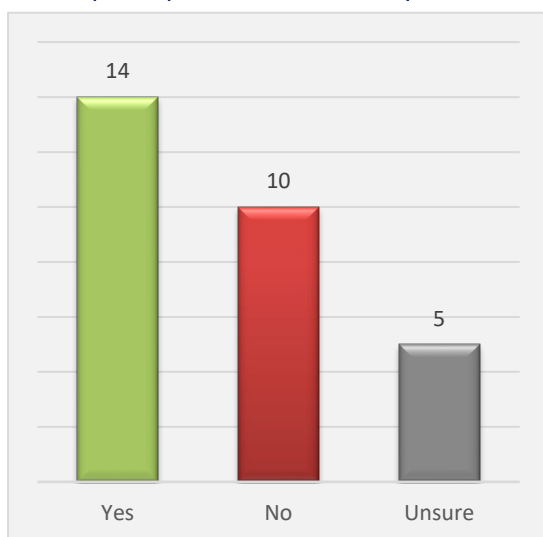
Does your club have access to accurate and current data relating to its social participant numbers (e.g. social competition participants, barefoot bowls, corporate bowls, etc)?



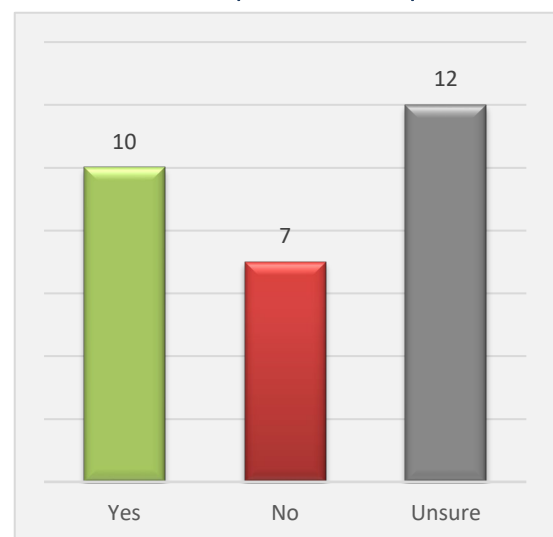
- **YES = 64%** (18 / 28 responses)
- **NO = 22%** (6 / 28 responses)
- **UNSURE = 14%** (4 / 28 responses)

Does your club have the workforce capacity and capability (i.e. the number and skills) of staff, board / committee members, coaches, officials, general volunteers to ...

... significantly increase its membership and participation in the next 5 years?



... significantly increase its financial sustainability in the next 5 years



Answered: 29 Skipped: 6

Prioritise how your club should work to increase member / participant recruitment and/or retention.

Strategies	High Priority	Medium Priority	Low Priority	Unsure	Total
Positive, welcoming and safe participation environments for all	93.10% 27	3.45% 1	3.45% 1	0.00% 0	29
Recruitment and development of more coaches who make the sport fun	31.03% 9	55.17% 16	13.79% 4	0.00% 0	29
A decreased emphasis on traditional competition formats	3.45% 1	62.07% 18	31.03% 9	3.45% 1	29
More flexible participation / competition options (i.e. shorter games, shorter seasons, different times / days, specific target audiences - e.g. corporate groups, disability groups, etc.)	31.03% 9	55.17% 16	10.34% 3	3.45% 1	29
More delivery of Bowls Australia participation products (Jack Attack and/or Rookie Rollers)	24.14% 7	27.59% 8	44.83% 13	3.45% 1	29
More access to better venues / facilities	44.83% 13	20.69% 6	24.14% 7	10.34% 3	29
High standard of competitions and better talent development pathways	24.14% 7	44.83% 13	31.03% 9	0.00% 0	29
Greater focus on recreational Bowls	27.59% 8	55.17% 16	13.79% 4	3.45% 1	29
Better promotion of the game to change the perception large sections of the community have of the sport	62.07% 18	34.48% 10	3.45% 1	0.00% 0	29
Other					3

<i>“Other” Suggestions</i>	
→	Utilising new lighting to attract new people to Twilight Bowls.
→	We are a club run by volunteers and have a limited recourse base to draw upon. Also the host club controls all revenue from games played and they run/control the corporate and barefoot bowls sectors.
→	We are working towards a centre of excellence for bowls which will then lead to increasing many of the above goals.

Why is your club affiliated with Bowls ACT?

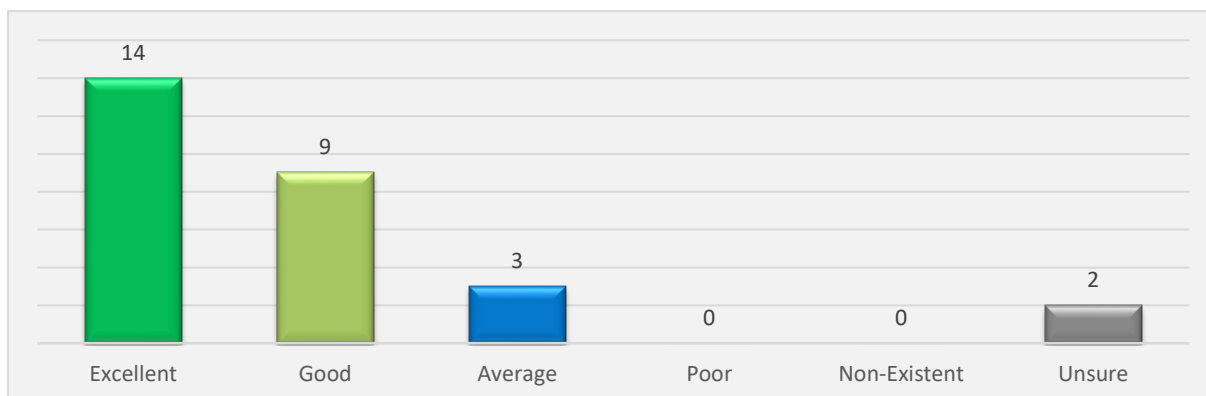
<i>Summary of response themes</i>	
→	<ul style="list-style-type: none"> - More clubs equals more pennant competition. - Mandatory for tournament participation / Because it is compulsory. - Because we have to be to play pennants / To allow members to play pennants. - To play bowls at a state level. - We have to be don't we?
→	Bowls ACT is an authority for providing guidance in all matters relating to Bowls and is our representative with Bowls Australia.
→	To help improve bowls in the ACT and Region.
→	Pathways for players.



Commentary

→ *The vast majority of responses related to the necessity of clubs to be affiliated with BACT in order for their players to play in pennant competitions. Whilst this is a relevant and very worthwhile value proposition associated with BACT membership, it should not be the only benefit of affiliation. With traditional membership in significant decline over an extended period, if the key reason clubs are affiliated with BACT is to allow players to play pennant competitions, the ongoing relevance of BACT faces significant risk.*

Rate your club's overall relationship with Bowls ACT.



Answered: 28 Skipped: 7

In relation to the future growth and sustainability of your club, what can each party do?

What can Bowls ACT do to help clubs?

- Promote Jack Attack.
- Distribution of communications from a central location.
- Promote the sport and its clubs.
- Get Bowls included as a school sport (i.e. via Sport ACT).
- Assist clubs looking to undertake significant change (e.g. amalgamation of men's and women's clubs, amalgamations of clubs, major facility related projects, participation growth projects, commercial projects, etc.).
- Coordinate growth strategies with all clubs
- Facilitate club forums at least twice per year.
- Deliver coach and umpire training.
- Deliver junior and talent development programs.

What can Clubs do to help themselves?

- Amalgamation of men's and women's clubs.
- Increase membership numbers.
- Host ACT and club events.
- Build and maintain positive and mutually beneficial relationships with Host clubs.
- Relocate to a new, purpose built, multi-purpose facility.

What can Host Clubs do to help?

- Continue to provide the support they do.
- Help with attracting more bowling members.
- Provide an indoor facility.
- Allow more flexibility in relation to diversifying and increasing our revenue streams.
- Recognise contribution of bowlers to the financial sustainability of the licenced club.
- Sponsorship and support for tournaments that are open to all bowlers.

Some sports are offering a range of flexible membership options in an attempt to grow and retain membership numbers, in an increasingly competitive environment. Which of the following concepts do you think Bows ACT and your club should consider?

Answer Choices	Responses	
Rock-up membership: Participants / athletes can participate and/or compete on a “pay per session” basis – i.e. they pay a fee each time they train / compete at / for the centre or club	29.63%	8
Non-athlete membership: Coach / official / volunteer / parent / social membership categories	25.93%	7
1 month membership	0.00%	0
3-month membership	3.70%	1
6-month membership	3.70%	1
Social bowls membership	66.67%	18
Family memberships: Reduced costs for families with multiple family members engaged with a centre / club (e.g. 3 or more)	40.74%	11
Program Membership: Applies to participation program participants, e.g. Jack Attack, Rookie Rollers	33.33%	9
Free try before you buy membership: to encourage non-members to trial a centre / club for a period (e.g. 2-3 weeks)	59.26%	16
On-line membership: Members are provided with access to online training programs and apps to manage their training, access online Bows community group, chat forums, etc.	18.52%	5
Targeted population membership: Reduced fees for targeted populations, e.g. indigenous, adults, females, CALD, disability, juniors, etc.	25.93%	7
Training membership: Targeted at people who want to train / be coached and be a part of the club community but, do not want to compete; or if they do, they only wish to do so within their own club environment.	33.33%	9
1-day membership: To allow people to compete in a specific Bows ACT event / competition	0.00%	0
Free parent of junior membership	22.22%	6
Other	25.93%	7

<i>“Other” Response Themes</i>	
→	Pensioner Membership



Section 4: Stakeholder Interviews Findings Summary

Project Stage 5 had MSC facilitate interviews with 19 key BACT stakeholders. Those interviewed represented all key elements of the ACT Bowls community, including Bowls clubs; Host clubs; BACT Board and staff; and BA. *For a full list of stakeholders who participated in interviews, please refer to Appendix A.*

This section presents the core discussion areas focused on during the interviews and highlights *key response themes* provided by interviewees.

Discussion Area: Membership Declines – *“Since 2009, the rate of total bowls memberships in the ACT has declined at the average rate of around 100 members per year. In member numbers, this is a decline from 1,649 members to 1,067 members in 2019. As a proportion of total members, this is an average decline of 6.74% p.a. At the current rate of decline, it is estimated Bowls membership in ACT clubs could be zero by 2035”.* (RSM Report, 2019).

Question – Is your club placing a major priority on competitive player membership (pennant) growth? If so, what strategies is it implementing, and are these proving successful? If not, why not?

Response Themes

- Yes – we are attempting to grow traditional (pennant) membership numbers, however our strategies to do so have not been successful over the past few years.
- We encourage social and corporate bowlers to come and practice with pennant bowlers and some of these do end up playing pennant, but the numbers are small.
- The only way we have seen significant additions to our pennant numbers in recent years, is when players change clubs – i.e. they are not happy with their club, so they come to play with us, or their club is wound up and they need another club to play with.

Commentary

→ *The majority of Bowls club stakeholders stated that the club spends the majority of its time undertaking pennant related activities, which is leaving little time / resources to be invested into other activities, e.g. looking to significantly increase social / barefoot Bowls participation and monetising this. Clubs having small numbers of pennant players (e.g. 100 or less) as their major focus and their major revenue source, is not a future focused business model for sustainable clubs – particularly if Host clubs are unable to continue to fully fund green development and maintenance into the future.*

It is also apparent that BACT spends an inordinate amount of time during the current pennant season, in undertaking pennant related business, potentially at the expense of other key activities, including activities which increase and diversify BACT revenue streams to ensure their ongoing sustainability and relevance.

Commentary

→	<i>If somebody was looking to purchase BACT as a going concern, it is doubtful the future focus of the business would revolve around investing significant resources in pennant related activities. BACT (and clubs) need to think about themselves as businesses, where the product is Bowls in its various forms; and they need to be strategic about how and where they invest their resources if the businesses are to survive, let alone thrive into the future.</i>
---	--

Discussion Area: EGM revenue

Question - If your club's revenue from EGMs (community contribution scheme, etc.) was zero, what would need to happen to ensure the club had a thriving future?

Response Themes

- With the exception of Belconnen Bowls Club and Canberra Bowls Club, all other clubs saw this situation as a major threat to their survival. However, the vast majority also do not see this situation as a potential reality, i.e. they feel safe in the relationship they have with their Host clubs.
- If this were to happen, we could not continue to operate.

Commentary

→	<p><i>The EGM revenues provided to ACT Bowls clubs by their Host clubs, via the community contribution scheme, appears to have bred an attitude of complacency. Generally, clubs are not considering the potential that things may be very different in years to come, in relation to EGM revenue, and this is hindering a much required culture of innovation, when it comes to the business models and activities of Bowls clubs.</i></p> <p><i>It is often the case that people (and clubs) do not look outside the square to do things very differently, unless they feel there is an imminent need to do so. This tact may result in many Bowls clubs in the ACT and Region simply "waiting for the asteroid".</i></p> <p><i>The saying, "If you keep heading in the same direction, you will probably get there" rings true here. If Bowls clubs don't already realise the urgent need for them to be heading in different strategic directions in order to sure up their future, it is hoped the ACT communicating the outcomes of this project with its affiliated clubs and their Host clubs (where these are in place) will provide the evidence to change their minds.</i></p>
---	--



Discussion Area: Social Bowls

- Social bowls is now dominant in all States and Territories – e.g. 97.5% of total participation in Northern Territory, 79.2% in the ACT and 77.7% in Tasmania.
- Tasmania has approx. 5 times the number of competition players and 5 times the number of participants that the ACT and the NT has 3 times the number of social participants.
- In the ACT, playing member numbers have declined by approximately 40% in the past 10 years.
- Playing members of Bowls clubs nationally in 2020-21 were only 35% of those registered in 1980. Over this same period (1980-2021) the Australian total resident population has increased by 75%, from 14.69 million to 25.70 million, at an average annual rate of 1.4%.
- In the ACT in 2020/21 only 15% of total participants were pennant players.

Question – Is your club placing a major priority on the growth and monetisation of social bowls? If so, what strategies is it implementing, and are these proving successful? If not, why not?

Response Themes

- Yes, we are because this provides a benefit to our host club through green fees and food / beverage sales.
- We don't focus on social Bowls as the Host club staff manage this.
- We get nothing from social Bowls – all of the revenue goes to the Host club, so there is no incentive for us to do so.
- Yes, because this contributes a significant amount of revenue, visibility and potential pennant players to the club.
- We would like to but we don't have the human resources to do this well.

Commentary

→	<p><i>The models in place between the various clubs and their Host clubs (where these are in place) relating to the delivery of social / barefoot Bowls vary significantly, which appears to impact on the priority clubs place on this growing offering.</i></p> <p><i>In situations where a Host club is managing the promotion, bookings and delivery of social formats of the game, the relevance of the Host club having a Bowls club attached to it, could be seen to be minimal in some cases. Bowls clubs working with Host clubs to maximise the benefit they can bring to Host clubs presents as an ongoing opportunity.</i></p>
→	<p><i>Many clubs stated they do some work in the social Bowls space, but due to their ageing and diminishing volunteer workforce, and the priority they place on pennant Bowls, they cannot place a significant level of priority on the social version of the game. Perhaps what these clubs would benefit from, is trying to find ways to enable them to focus on this element of their business, as opposed to looking for excuses as why they cannot do so. One example of a potential strategy could be for clubs to partner with commercial provider of social Bowls activities / competitions (i.e. an external provider plans and delivers the club's barefoot bowls activities and the club keeps a "clip of the ticket" per social Bowler). The commercial provider could be a company whose purpose is to provide social sporting opportunities such as Urban Rec Canberra, or an individual endorsed by BACT to deliver specific social product offerings. Another example could be for BACT to play a leading role in the management of a series of barefoot / social Bowls events.</i></p>

Discussion Area: Social Bowls data

Question - Does your club collect accurate data re social players? If so, is this via Bowls Link? If not, why not?

Response Themes

- Some Host clubs stated they collect this data via their point of sale systems, whilst others do not.
- Bowls clubs offering social / barefoot Bowls do not collect or report on accurate data in this space.

Commentary

→	<p><i>The opportunity for Bowls clubs to collect quality data, as it relates to social players is clear. This data can demonstrate the positive impact social Bowls is having for Bowls clubs and Host clubs; it can demonstrate the success (or otherwise) of strategies designed to grow participation; it can show revenue sources from social Bowls activities; and it can track the transition of social players to competitive playing members.</i></p> <p><i>The need for a national data collection and reporting system to be implemented in the ACT by all clubs, which is easy for clubs and end users, is obvious. The need for this data to be shared by clubs with BACT and BA is also clear. Bowls is much bigger than pennant and if the sport of Bowls, as well as the clubs and STAs who deliver it, wish to remain relevant and sustainable, being able to accurately report in this space, communicate with social players and potentially monetise this cohort via commercial partnerships, etc, data management of social Bowlers should be a priority. <u>Note:</u> In discussions with BA, MSC is aware that work is underway in the development of a QR code solution to this issue, which will align with the BowlsLink system. BACT working with BA to pilot such a system presents as a key opportunity.</i></p>
→	<p><i>A significant barrier to clubs prioritising the delivery / management of social / barefoot Bowls is seen to be the need to have club personnel (volunteers or paid) to be at the venue to allow people to play. Whilst a small number of Host clubs are currently using on-line “book a rink” systems, these systems are all different and they still require somebody to be present to allow social players and members alike access to the greens. Clubs and BACT could benefit from looking for solutions to this barrier to participation. An example used in the sport of Tennis is the Book a Court system which allows social players (and members) to book a court, pay for it and receive an access code to the court, online.</i></p> <p><i>Benefits of Book a Court for the club are stated as:</i></p> <ul style="list-style-type: none">✓ <i>Reduced administration impact to volunteers</i>✓ <i>Increased revenue and secure payment method</i>✓ <i>Sustainability of venues</i>✓ <i>Greater ability to promote venues online</i>✓ <i>Attract occasional players to your club</i> <p><i>Benefits to members and occasional tennis players:</i></p> <ul style="list-style-type: none">✓ <i>Improved booking process (gives control, flexibility and freedom)</i>✓ <i>Greater security for players</i>✓ <i>Greater access to the facility</i>

Commentary

→	<i>BA has recently provided clubs with an on-line rink booking system – Rink Booker. It appears as though this system was designed to allow clubs to manage player numbers in line with COVID requirements. How many BACT affiliated clubs used this system and whether or not this system could be used to allow bowlers to book, pay and access club’s green space at times that suit them, requires further exploration.</i>
---	---

Discussion Area: BACT Membership Model

Question – What changes to the current BACT membership model should be considered?

Response Themes

- The majority of interviewees did not provide specific strategies in this space.
- Some interviewees stated their clubs currently have various membership categories, however most of these members (e.g. social players) are not becoming members of BACT.

Commentary

→	<p><i>Bowls clubs in the ACT would benefit from not using traditional (pennant) membership as they key metric of success. As previously mentioned, Bowls is much bigger than pennant and pennant membership has decreased nationally year on year since at least 1980.</i></p> <p><i>The proposed purpose statement in BA’s 2022-2025 strategic plan is to “future proof Bowls: CONNECTING MORE PEOPLE TO BOWLS – IN MORE WAYS – MORE OFTEN”. BACT implementing a membership model which encourages clubs connect more people to their clubs through various participation offerings, and also provides increased and diversified revenue streams for clubs and for BACT, is a core focus of this project and this will require a more flexible and “user-experience” focused approach to the model currently in place, which simply captures competitive / pennant players as members of BACT.</i></p> <p><i>Any future BACT membership model also needs to encourage / incentivise clubs to provide data relating to all membership categories, as many clubs currently do not register social players, etc. with BACT as they would need to pay a fee per person to BACT.</i></p>
---	---



Discussion Area: Club revenues

Question – What needs to be prioritised for your club’s revenues to significantly increase?

Response Themes

- Increase the club’s membership.
- Our Host club to allow us to source revenues via catering associated with our hosting of events.
- Our host clubs to provide increased financial support to our club.
- Our club access more government grants (e.g. facility grants and others).
- Our club to sell its assets and relocate to a new, purpose built and mixed use facility, which allows us to access a variety of ongoing revenue streams.

Commentary

→ *There appears to be a lack of strategic thinking in this space by the majority of clubs. As previously mentioned, this may be due to the significant financial and human resource assistance many clubs are receiving via their Host clubs and the perception that this reliance will last forever, without the club needing to do much at all. This is a risky position for clubs to be in.*

Discussion Area: Planning

Question – Does your club have a documented plan designed to future proof itself and if so, what impact is this having?

Response Themes

- The vast majority of Bowls clubs appear not have current strategic plans in place to guide their future direction and activities.

Commentary

→ *All BACT affiliated Bowls Clubs having current strategic plans in place; and for Bowls clubs / committees and Host clubs to have a Plan for Bowls, is clear. Where clubs are taking a planned and strategic approach to their activities, the types of activities being undertaken reflect this, e.g. sourcing funds to undertake significant facility developments / re-developments; proposed sale of assets to allow new facilities to be developed and new / sustainable operating models to be implemented; partnerships with others sports; significant growth in social Bowls; etc.*

***“A goal without a plan is only a dream”
(Brian Tracey)***

Section 5: Clubs Focus Group Session Findings Summary

MSC Director, Mike McLaughlin, facilitated a x face to face stakeholder Focus Group Sessions hosted at the Canberra Bowls Club on Tuesday 19th April.

13 key stakeholders, representing 9 Bowls ACT affiliated clubs and Bowls Australia participated in this 3 hour session. *Note: In addition to the session’s active participants, a Bowls ACT Director and the BACT Executive Officer were both in attendance as observers.*

For a full list of stakeholders who participated in Focus Group Sessions, please refer to Appendix A.

This section presents the core discussion areas focused on during the session and highlights **key response themes** provided by participants.



Activity 1 – Glass half full versus glass half empty

Glass half full groups

Imagine it's late 2025. BACT, its affiliated clubs (and host clubs) and Bowls Australia have worked together to implement its FIT-4-FUTURE PURPOSE CLUBS IMPLEMENTATION PLAN, and it has been a ***Barnstorming success!*** Club and BACT membership and participation numbers are up; club and BACT revenues are up; revenue sources are diversified, with reliance on EGM revenues decreasing; clubs are managing financially sustainable operating models; and relationships between Bowls clubs and Host clubs are stronger than ever. Brainstorm the key reasons why this was the case. Please write each key reason on a sticky note and place it in the space below.

Glass half empty group/s

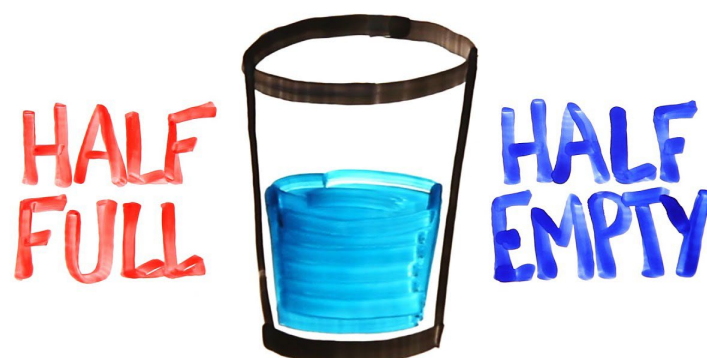
Imagine it's late 2025. BACT, its affiliated clubs (and host clubs) and Bowls Australia have worked together to implement its FIT-4-FUTURE PURPOSE CLUBS IMPLEMENTATION PLAN, and it has been a ***horrible failure!*** Club and BACT membership and participation numbers are down; club and BACT revenues are down; club reliance on EGM revenues has increased; clubs are not managing financially sustainable operating models; and relationships between Bowls clubs and Host clubs are more strained than ever before. Brainstorm the key reasons why this was the case. Please write each key reason on a sticky note and place it in the space below.

A summary of the responses from the 2 x groups who were asked to take the “**glass half full**” position is presented below.

- Bowls clubs and host clubs had planned, positive and mutually beneficial operating models and relationships in place.
- Bowls clubs realised that “all Bowls is Bowls” and anyone can be a bowler; and these clubs prioritised the provision of participation offerings, designed to suit the participation motivations of all key market segments (e.g. current and future competitive bowlers, social bowlers, juniors, women, corporates, and specific audiences such as people with a disability and others).
- Clubs have the attitude / position, that if somebody wants to bowl, we say “YES!”, as opposed to finding a way to say no.
- A refreshed Bowls ACT competition framework designed to deliver new and exciting events.
- Bowls clubs are absolutely aware that if they do not grow the number of people participating in Bowls and accessing facilities, as well as operating sustainable business models, the future of their clubs in the short-medium term is at risk. Clubs were therefore prepared to do what was needed to ensure their club is going concern for the long term.
- Clubs had professional staff / contractors managing and delivering their Bowls activities.
- Bowls clubs are widely viewed as “community hubs” as opposed to under-utilised spaces, which are only accessed by old people who play competitive Bowls.
- Bowls clubs are modern, fun, comfortable and welcoming places for people to connect and play.
- Bowls had very high visibility in the ACT and Region via multiple channels (e.g. streaming, TV, social media, print media, radio, highly accessed clubs, events, in schools, etc.)
- Clubs embraced new technologies designed to connect with current and new consumers (competitive bowlers, social participants, parents of juniors, etc.)

A summary of the responses from the 2 x groups who were asked to take the “glass half empty” position is presented below.

- Resistance to new ideas / change.
- The sport not being relevant to today’s consumers (e.g. youth, professionals, etc.).
- Continued over-reliance on gaming revenues.
- Host clubs not prioritising Bowls within their business models moving forward, for economic reasons.
- Club operations models and Bowls engagement offerings do not align with current trends.
- BACT affiliated clubs (and BACT) took too long to make the changes needed to save the sport.
- There was a lack of capability (skills) and capacity (number) of club personnel to devise and implement new operating models and activities needed to grow the sport.
- The ongoing reduction of EGM revenue was too much and Bowls clubs could not survive.
- Volunteer burnout and the aging volunteer cohort at clubs.
- Bowls clubs and host clubs were not willing to compromise and work together in mutually beneficial ways.
- A lack of a Bowls in the ACT planning framework which outlined common goals and how the ACT Bowls community (host clubs, Bowls clubs / committees, and Bowls ACT) would work together to achieve these.
- Bowls clubs focusing too much energy and resources on a small number of competition / pennant bowlers, to the exclusion of much larger numbers of social participants.
- A lack of new ideas being implemented to attract and service current and future participants (and members).
- The continued perception that Bowls is only a sport / activity for old people.
- A lack of Fit-4-Future Purpose Bowls facilities in the ACT and Region which allow indoor, all year round and night time play.
- Clubs did not want to significantly grow the sport (i.e. participants and members) due to the workload required to do so.
- Poor communications across the ACT Bowls community.
- Bowls clubs / committees not realising they need to operate as businesses in order to survive, let alone grow.
- Host clubs not prioritising Bowls within their business models moving forward.
- An ageing facilities footprint, which was not meeting the expectations of current consumers



Activity 2 – What is currently driving the thriving future of Bowls in the ACT and Region and its club delivery system; what is blocking this from happening; and what should be done to address the blockers? (60 mins)

<p><u>KEY DRIVING FORCES</u></p> <p>Bowls in the ACT and Region - where it is right now ...</p>	<p><u>KEY BLOCKING FORCES</u></p>	<p><u>STRATEGIES TO ADDRESS BLOCKING FORCES</u></p> <p>Bowls in the ACT and Region - where it should be ...</p>
<p>The growth of social / barefoot Bowls.</p>	<p>Resistance to change (i.e. how the sport is marketed, how it is played, when it is played, who it is played by, how clubs embrace the wider community of bowlers and non-bowlers, the benefits of synthetic greens, etc.)</p>	<p>The recommendations / actions to come from this BACT Fit-4-Future Purpose Clubs project (and the evidence which crafted these), to be openly shared with all club and host clubs. People running clubs need to know the true nature of the situation facing our sport. Then, clubs, host clubs and BACT need to “opt in” to proactively and positively work together to do what is best for the future of Bowls in the ACT and Region.</p> <p><i>A Bowls in the ACT Participation and Engagement Strategy / Plan</i> to provide the blueprint for how BACT and clubs will collaborate with purpose with key partners to drive growth in participation and engagement in Bowls in the ACT and Region.</p> <p>BACT to work with each club to design club specific strategic and/or other plans (e.g. commercial plans, facility plan, etc).</p>
<p>Strong Bowls club committees who are prepared, and adequately resourced, to implement new ideas to ensure their thriving future and the thriving future of Bowls in their communities.</p>	<p>Competition from many other sport and active recreational activities, be they organised (e.g. other sports which require a competition structure and facilities), or unorganised (e.g. walking / running, mountain biking / cycling).</p>	<p>As above.</p>

KEY DRIVING FORCES	KEY BLOCKING FORCES	STRATEGIES TO ADDRESS BLOCKING FORCES
Positive relationships between Bowls clubs / committees and Host clubs and the support these Host clubs provide.	The positioning of Bowls as an old person's sport only.	Bowls ACT to work with clubs to develop and drive the implementation of a <i>Bowls ACT Marketing, Communications and Commercial Strategy / Plan</i> .
Greatly improved relationship between BACT and clubs in recent times.	A lack of visibility of Bowls in all of its forms.	As above.
The current BACT Board and Executive Officer.	The local climate can be prohibitive to sport participation.	Bowls ACT to work with identified clubs / host clubs to drive the development of indoor, synthetic greens in strategic locations.
	Bowls club facilities which are not modern, fun, comfortable and welcoming places for people to connect and play.	Clubs to devise club specific facility enhancement strategies / plans to guide the sustainable modernisation of club facilities. Bowls ACT to support this.
	A lack of capacity and capability of Bowls club volunteers to drive the thriving operations of the clubs into the future.	Bowls ACT to assist clubs to access suitable training and resources designed to attract, train, support and retain volunteer workforces (boards / committees, coaches, providers of participation products) of the size and skills needed to take the club into the future. Clubs to look to have paid staff / contractors to drive the delivery of the club's Bowls related activities.
	The lack of human and financial resources of BACT and therefore their lack of capacity to assist clubs in significant ways.	BACT to develop and drive the implementation of a <i>Commercial Strategy / Plan</i> designed to increase and diversify its revenue streams, to enable it to employ more staff and put more back into the sport.
	The cluttered Bowls ACT competitions calendar.	BACT to work as closely as possible with clubs to develop and promote suitable annual calendars.
	Host clubs not prioritising Bowls within their business models moving forward	BACT to assist Host clubs and Bowls clubs / committees to develop club specific Bowls Strategies / Plans designed to maximise the mutual benefits of the facility having a thriving Bowls community.

Activity 3 – For Bowls in the ACT and Region to achieve its potential, what should the core roles of Bowls Clubs, Host Clubs (where these are in place) and Bowls ACT be?

Bowls Clubs	Host Clubs
<ul style="list-style-type: none"> → Host excellent Bowls events → Drive local participation growth → Develop local talent (players, coaches, officials, volunteers) → Club planning framework (strategic, facility, membership and participation, etc.) → Club competitions and national participation program delivery → Targeted and localised marketing, and membership and participation growth → Facility planning, management and advocacy → Local relationships management → Staff and volunteer management → Implement BA and BACT policies → Facility management (in cases where clubs are not in a Host Club partnership) 	<ul style="list-style-type: none"> → Provide high quality and sustainable (financially and environmentally) bowling and community facilities → Assist Bowls clubs to drive growth in Bowls, which in turn benefits their club
Bowls ACT	
<ul style="list-style-type: none"> → BACT governance, planning and coordination → ACT competitions and events management (including results management) → Promotion of Bowls in the ACT and Region → ACT teams and talent development → Conduct education within the agreed national framework (coaching and officiating) → National participation program delivery (Jack Attack, Rookie Rollers, etc.) → Implement national policies → Secure state government funding → Maintain a positive and mutually beneficial relationship with BA 	
Shared (Bowls Clubs, Host Clubs and Bowls ACT)	
<ul style="list-style-type: none"> → Enhance the experience and grow the game! → Work positively with all elements of the ACT and Region Bowls community and do what is best for the future of Bowls – communicate – communicate – communicate! → Financial sustainability → Club development → Facility planning → Promotion of Bowls → Governance of Bowls → Talent development → Safety and integrity 	

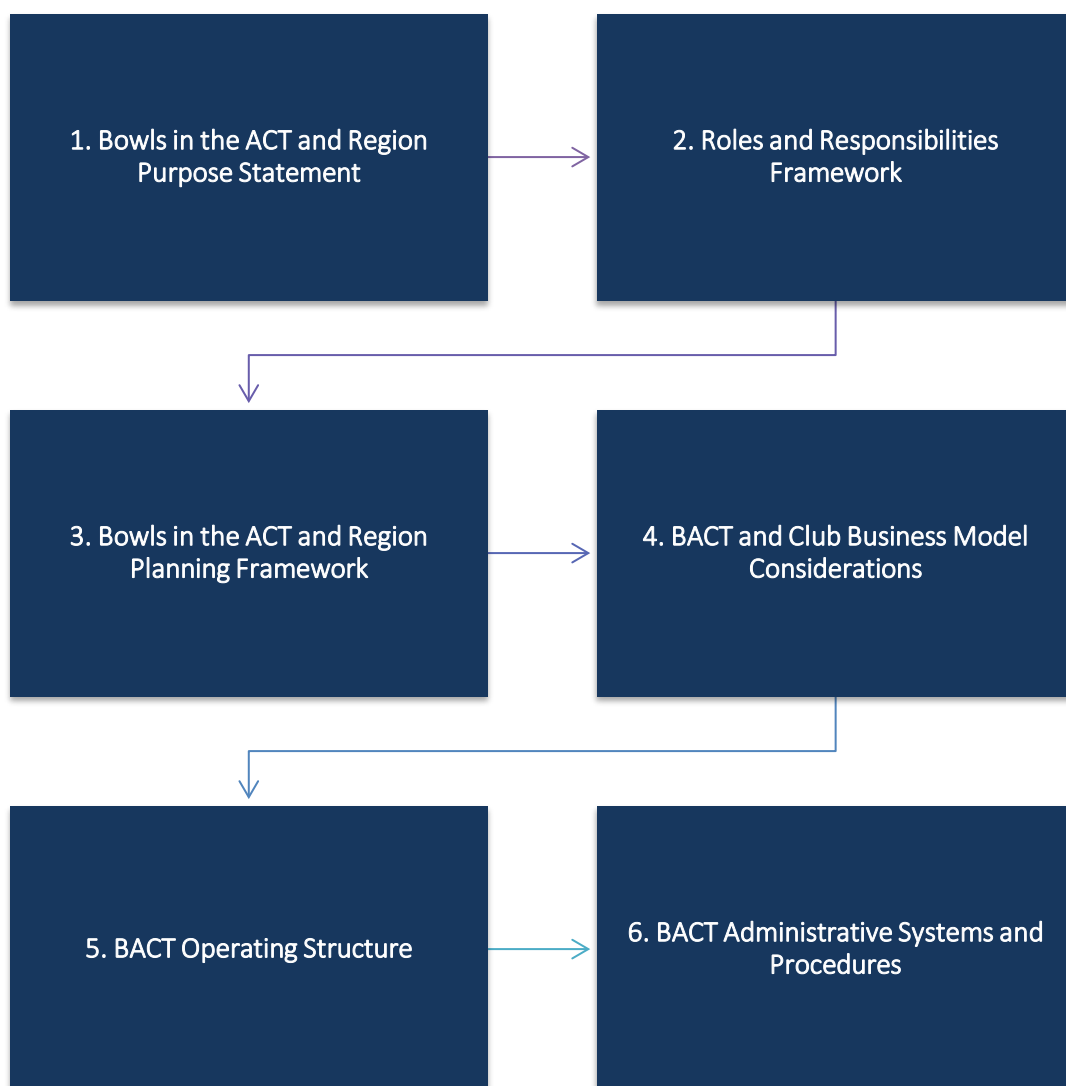
Section 6: Preliminary Opportunities

Based on the evidence collected via Project Stages 3 – 6, i.e. Document Review; Stakeholder e-Survey; Stakeholder Interviews; and Clubs Focus Group Session, the following preliminary opportunities are presented for consideration by the Project Reference Group (PRG), prior to MSC undertaking future stages of the Review.



These *preliminary opportunities* are not recommendations, however, combined with PRG feedback, they will guide MSC when crafting the activities to be incorporated into Project Stage 9 – the Fit-4-Future Purpose Design Lab.

Preliminary Opportunity Focus Areas



1- Bowls in the ACT and Region Purpose Statement

Ideally, a future focused **Bowls in the ACT and Region Purpose Statement** would be the key anchor point for the structure and activities of all elements of the ACT and Region Bowls delivery system, i.e. Bowls clubs, Host clubs, BACT, commercial providers, etc.

The Bowls in Australia purpose statement within the draft version of the Bowls Australia 2022-2025 Strategic Plan is, **To future proof Bowls: *CONNECTING MORE PEOPLE TO BOWLS – IN MORE WAYS – MORE OFTEN.***

The opportunity for an overarching Bowls in the ACT and Region Purpose Statement to be finalised is clear, and must form a key element of the soon to be developed *BACT 2022-2025 Strategic Plan*.

Ideally, this purpose statement would be endorsed and applied by all elements of the ACT and Region Bowls community.

2 - Roles and Responsibilities Framework

Once an agreed Bowls in the ACT and Region *Purpose Statement* has been agreed upon, it will be important for each key element of the ACT and Region Bowls delivery system to understand and agree on the **key roles and responsibilities** they (and other elements of the delivery system) play in bringing the Purpose Statement to life. This will provide clarity of purpose for all elements of the Bowls in the ACT and Region delivery system, along with recognition of the importance of, not only each element's own roles, but recognition of the importance of the roles of ALL elements of the system.

Although the nature of the Roles and Responsibilities Framework will need to be confirmed, the summaries on the following page, to come from the 19th April Club Focus Session, could form a good starting point.



Potential Bowls in the ACT and Region Roles and Responsibility Framework Summary

Bowls Clubs	Host Clubs
<ul style="list-style-type: none"> → Host excellent Bowls events → Drive local participation growth → Develop local talent (players, coaches, officials, volunteers) → Club planning framework (strategic, facility, membership and participation, etc.) → Club competitions and national participation program delivery → Targeted and localised marketing, and membership and participation growth → Facility planning, management and advocacy → Local relationships management → Staff and volunteer management → Implement BA and BACT policies → Facility management (in cases where clubs are not in a Host Club partnership) 	<ul style="list-style-type: none"> → Provide high quality and sustainable (financially and environmentally) bowling and community facilities → Assist Bowls clubs to drive growth in Bowls, which in turn benefits their club
Bowls ACT	
<ul style="list-style-type: none"> → BACT governance, planning and coordination → ACT competitions and events management (including results management) → Promotion of Bowls in the ACT and Region → ACT teams and talent development → Conduct education within the agreed national framework (coaching and officiating) → National participation program delivery (Jack Attack, Rookie Rollers, etc.) → Implement national policies → Secure state government funding → Maintain a positive and mutually beneficial relationship with BA 	
Shared (Bowls Clubs, Host Clubs and Bowls ACT)	
<ul style="list-style-type: none"> → Enhance the experience and grow the game! → Work positively with all elements of the ACT and Region Bowls community and do what is best for the future of Bowls – communicate – communicate – communicate! → Financial sustainability → Club development → Facility planning → Promotion of Bowls → Governance of Bowls → Talent development → Safety and integrity 	

3 - Bowls in the ACT and Region Aligned Planning Framework

Once there is clarity and agreement in relation to the *purpose* of the Bowls in the ACT and Region delivery system; as well as the *key roles and responsibilities* of the different elements of the delivery system (and what they do together), the opportunity exists for a fit for future purpose Bowls in the ACT and Region **Aligned Planning Framework** to be developed. This would provide the platform from which the elements of the delivery system optimises the role they play in achieving the Bowls in the ACT and Region Purpose Statement.

Opportunities associated with a fit for future purpose Bowls in the ACT and Region *Aligned Planning Framework* could include (but may not be limited to):

- 2022-2025 BA Strategic Plan
- 2022-2025 BACT Strategic Plan
- 2022-2025 BACT Fit-4-Future Purpose Implementation Plan
- 2022-2025 BACT Annual Operational and Project Specific Plans
- 2023-2025 Bowls in the ACT Participation and Engagement Strategy
- 2023-2025 BACT Affiliated Club Strategic Plans
- 2023-2025 BACT Annual Operational and Project Specific Plans

4 - BACT and Club Business Model Considerations

BACT and all affiliated Bowls clubs need business models which enable them to thrive, not survive! How BACT and clubs turn the problems they currently face into opportunities and implement new strategies to increase membership and participation rates to the national average (and above); and restructure and diversify business models away from traditional revenue streams, are priorities for this project. A summary of some considerations to be fleshed out in future stages of the project are presented below.

Partnerships

BACT has very few financial, human, or physical resources. This, in combination with the fact that the predominant value proposition affiliated clubs place on their BACT membership relates to clubs' dwindling pennant players being able to compete, places BACT in a precarious position, should it not source additional and diversified revenue.

BACT needs to partner with agencies, organisations and individuals who align with the purpose of BACT and its values and who can improve organisation efficiencies, provide greater service to BACT clubs and/or provide new sources of revenue to the association.



Examples of partnership entities BACT could look to enhance or establish include:

- Host Clubs
- Bows Australia
- ACT Government:
 - Chief Minister, Treasury and Economic Development Directorate (Sport and Recreation)
 - Health Directorate
 - Environment, Planning and Sustainable Development Directorate
- NSW Government:
 - Office of Sport
 - Ministry of Health
- Commercial providers of identified Bowls participation offerings, e.g. Jack Attack, Barefoot Bowls, corporate events, etc. If Bowls in the ACT and Region is to grow significantly, it may not be able to do so via its current club delivery system alone.

Not only is the size of the delivery system's footprint an inhibiting factor for the significant growth of the sport in the ACT and Region, so too is the number of clubs who are comfortable with the number of members they currently have. Some are even happy with their recent membership decrease, as this has made the delivery of their offerings *easier*. These two observations pose a very significant risk to the future growth of the sport in the ACT and Region.

To really grow Bowls in the ACT and Region, and BACT / club membership, the size and nature of the Bowls delivery system may need to expand and become more diversified. BACT and clubs may need to connect with, resource, support and help grow a product / experience delivery system with a greater reach than what is currently in place. The opportunity for clubs and BACT to partner with commercial providers of identified participation products and events, is clear.

- Commercial / service provider partners, e.g. Bowlo Sports and Leisure - <https://www.bowlo.beer/>
- Other sports

Membership Model

Clubs would be well serviced to take the strategic position that, *"all Bowls is Bowls and everyone can be a bowler"*. The participant, not just the pennant player, should be at the heart of the design and delivery of club activities. The future of Bowls is not what it used to be!

BACT and its affiliated clubs have the opportunity to work together to develop and implement a membership model designed to **CONNECT MORE PEOPLE TO BOWLS – IN MORE WAYS – MORE OFTEN**; to minimise off ramps to all elements of the ACT and Region community engaging with Bowls; and to capture, share and monetise data associated with all Bowls consumers in the ACT and Region.

BACT and clubs have the opportunity to use a UX Design approach (**i.e. a design process whose sole objective is to design a system that offers a great experience to its users**) to identify and design a suite of membership categories, and other consumer connection points, to ensure all elements of the current and future BACT and Region Bowls community (not just pennant players) are able to see *real value* in being formally connected to clubs and BACT. Based on the UX approach, and the participation motivations associated with each membership category, BACT must clearly identify and articulate the specific value proposition associated with each membership category / connect point / package.

Events and Competitions

In addition to events currently owned / managed by BACT (all of which target current pennant players), BACT has the opportunity to design and manage the delivery of a suite of mass participation events, designed to deliver an exceptional experience to a far broader market and to potentially monetise this delivery. Events could include those focusing on Jack Attack, Barefoot Bowls and/or events targeting specific market segments (e.g. cultural backgrounds, LGBTI+, etc.).

Facilities

In addition to BACT (and BA) playing a strategic support role in the facility space, to assist Bowls clubs and Host clubs develop / re-develop and/or relocate their facilities, BACT may also have the opportunity to provide a valued service to its affiliated clubs and their Host clubs, which could reduce Host club / Bowls club incurred costs associated with facility maintenance, whilst also providing a much needed revenue stream to BACT.

One opportunity which could be explored is a BACT-managed, consolidated Bowls maintenance strategy, whereby BACT would partner with a suitable provider to undertake the maintenance of all BACT affiliated club greens. *Note: This concept was mentioned within the RSM report (2021) and was presented to MSC by a current BACT director, as an opportunity for exploration.*



Potential benefits of a BACT-managed, consolidated Bowls maintenance strategy to Bowls / Host Clubs, players and BACT

- Higher quality greens across the ACT and Region
- Consistent maintenance practices of all greens
- Better club budgeting, as it would involve a fixed fee for yearly maintenance
- Reduction in cost liability to clubs as shared costs through a management fee should reduce the financial burden on each club, due to there being the removal of administration costs, removal of wages and associated cost for grounds staff at each club, employee on-costs, etc.
- Bundling greens maintenance into one contract will allow shared resources, reduction in equipment needs and better purchasing power for materials, e.g. chemicals, sand, soil, seed, etc. further reducing overall costs
- Increase FTE staff of Bowls ACT would allow greater deliverables across the sport

Governance Models

The majority of BACT clubs are in a formal partnership, but are legally separate from their Host club. This arrangement is clearly working very well in many cases, and less effectively in others – for various reasons. However, it is MSC’s understanding that the Canberra North Bowling Club and the RUC are operating jointly as one legal entity – i.e. the “Bowling Club” is actually operating as a Bowls committee, within the RUC. This governance and operating model appears to be working well in this instance, and for reasons including (but not limited to) the decreased level of governance and compliance responsibilities of a “Bowls Committee” versus those of an “incorporated Bowling club”. This essentially allows the Bowls Committee to focus on Bowls, as opposed to other perhaps less interesting / enjoyable and time consuming activities.

This governance and operating model is in place and working well in many clubs across Australia and presents as an opportunity for other BACT affiliated Bowls clubs to consider.

5 - BACT Operating Structure

Flowing on from Opportunity Areas 1-4 (above), an important consideration for BACT following the completion of this project (and the Implementation Plan which comes from it), will be to ensure the BACT human resource structure (professional and volunteer) optimally supports the delivery of the BACT Strategic Plan and the Fit-4-Future Purpose Clubs Implementation Plan.

form follows function: Strategy – Structure – People

Although the precise nature of a future BACT staffing and committee / working party structure cannot be finalised until the Implementation Plan has been developed, it is clear that the current situation which sees a single (.08 FTE) Executive Officer role tasked with the responsibility of being the sole staff member for BACT, will be inadequate moving forward, if the sustainable future of Bowls in the ACT and Region is to be secured. The opportunity to embed additional human resources to support BACT’s effective delivery of strategic (and other) plans, should be prioritised.

Note: Sourcing additional human, financial and national services support from BA, in order to effectively deliver the Post Project Implementation Plan should also be a key focus and will form a key element of the partnership with BA discussed in Opportunity Area 4 (above).

If BACT cannot secure additional human resources, this (in combination with many other factors already presented in this Paper) places the future relevance and viability of BACT as the peak body for Bowls in the ACT and Region at risk; in which case other governance and operating models would require exploration – e.g. dissolving BACT and affiliating ACT and Region clubs with Bowls NSW; dissolving BACT and affiliating ACT and Region clubs directly with BA; etc.

6 - BACT Administrative Systems and Procedures

Digital Infrastructure

A clear opportunity presents for BACT to work with BA to optimise the benefits BACT and its affiliated clubs access via all functional elements of the **BowlsLink Member Management digital platform** and **other BA digital systems** (including competition management; a centralised connected membership database system; new and improved websites; and online rink booking system). Ideally, this would allow BA, BACT, clubs and all consumers of BACT, club and commercial provider activities (refer partnerships), to effectively and efficiently manage, transact, communicate, report and/or connect online, via multiple device types, ensuring all data is collected and easily retrievable, as appropriate.



Centrally Managed Services

In addition to BACT accessing national services provided by BA, to maximise operational efficiencies and reduce operating costs, an opportunity for BACT (dependent upon available resources) to provide centrally managed administrative services to affiliated Bowls clubs also presents as an opportunity.

Ideally, BACT would be in a position to assist clubs who seek support in areas such as policies and procedures; financial services; incorporation requirements; membership payment systems; purchasing of items; quarterly financial statements; recruitment and payroll management services; marketing and communications support; coach, umpire and volunteer development; and so on.

Section 7: Next Steps

The next stage of the Review involves MSC meeting with the PRG to discuss the information contained within this Paper. This meeting will occur via webinar on Tuesday 10th May.

Following this meeting, MSC will facilitate a 5 hour *Fit-4-Future Purpose Club Operating Models Design Lab* with up to 30 key stakeholders (i.e. PRG, Bowls club and Host club representatives) to check and challenge identified Fit-4-Future Purpose Club Business Model design concepts and strategies. This Design Lab workshop is scheduled for Thursday 26th May.

Following the Design Lab workshop, MSC will prepare a *Fit-4-Future Purpose Club Operating Model Design Lab – Findings Summary Paper*, which will be followed by a PRG webinar (date TBC); and then the final stage of the Project – the *Fit-4-Future Purpose Clubs Project Implementation Plan* will be submitted to BACT in June 2022.



Mike McLaughlin

MBA (Sport Management)

Bachelor of Sports Science (Sports Studies - Coaching)

Grad Dip (Sports Coaching)

Cert IV in Training and Assessment



Appendix A:

Interview and Focus Session Participants

Stakeholder Interviewees

Interviewee	Bowls ACT affiliated club / Other Organisation	Bowls-related role
Bill Donovan	Belconnen Bowling Club	Bowls Secretary
Nicholas Hind	Bowls Australia	Senior RBM
Ian Smith	Tuggeranong Vikings Lawn Bowls Club	President
Penny Auld	Queanbeyan Bowls Club	Womens Co-ordinator
Simon Dolejsi	ACT Government – Sport and Recreation	n/a
Neil Dalrymple	Bowls Australia	CEO
Peter Grills	Yowani Country Club	Club Representative
Matthew Styles	Canberra Bowling Club	Director, Bowls ACT
Lynne signor	Vikings Bowls Club; Activity Orgnr Isabelle Garden	President
Mark Carter	Canberra North Bowling & ACT Rugby Union Club	Bowls Committee President
Dianne Marquet	Weston Creek	BACT Board member
Geoff McKay	Yes	President
Colleen Picker	Crookwell Women's Bowling Club	Club Representative
Ciaran O'Rourke	EO	Bowls ACT
Dennis Ryan	Weston Creek Bowling Club	Secretary
Andrew Carmody	Weston Creek Bowling Club	Club Representative
Elaine Tse	Weston Creek Women's Bowling Club	Club Secretary, player
Jeremy Wilcox	The RUC	Club manager
Lesley Thoms	Goulburn Railway Women's Bowling Club	Secretary

Clubs Focus Group Session Participants

Participant	Bowls Club / Host Club	Role
Mick Fogarty	Canberra North Bowling Club	Championship Director
Melda Fowler	Weston Creek Womens Bowling Club	Vice President
Di Marquet	Weston Creek Womens Bowling Club / Bowls ACT	Match / BACT Director
Geoff McKay	Canberra Bowling Club	President
Coral McMurray	Queanbeyan Bowls Club	President
Greg Pepper	Yowani Country Club Bowling Club	Vice President
Keith Pickard	Canberra Bowling Club	Club Representative
Greg Rice	Goulburn Railway Bowling Club (Men's Bowls)	Vice President
Sharon Steele	Weston Creek Womens Bowling Club / Bowls ACT	Match / BACT Director
Lesley Thoms	Goulburn Railway Women's Bowling Club	Secretary
Reg Thoms	Goulburn Railway Bowling Club (Men's Bowls)	President
Peter Tormey	Weston Creek Bowling Club	Bowls Organiser
Ian Whybrow	Canberra Labor Club	Bowls & Events Coordinator
<i>Ciaran O'Rourke</i>	<i>BACT EO (Present as an Observer)</i>	
<i>Matthew Styles</i>	<i>BACT Director (Present as an Observer)</i>	