



# MANAGEMENT PLANNING

## Step by Step Guide

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## **CONTENTS**

<b>Introduction.....</b>	<b>1</b>
<b>Sustainable Golf .....</b>	<b>1</b>
<b>The benefits of Integrated Management Planning.....</b>	<b>1</b>
<b>Step by Step Guide .....</b>	<b>3</b>
<b>The Integrated Management Planning (IMP) Process.....</b>	<b>3</b>
<b>Step 1 Environment Team.....</b>	<b>5</b>
<b>Step 2 Club Environmental Policy.....</b>	<b>5</b>
<b>Step 3 Self Evaluation.....</b>	<b>5</b>
<b>Step 4 Further Advice.....</b>	<b>6</b>
<b>Step 5 Integrated Management Plan (IMP) Documents .....</b>	<b>6</b>
a) <b>IMP Background document (Current Policies and procedures, past and present achievements).....</b>	<b>7</b>
b) <b>IMP Action Plan.....</b>	<b>7</b>
c) <b>Course Mapping/Site Plan.....</b>	<b>8</b>
d) <b><u>Possible</u> Supporting Documents.....</b>	<b>8</b>
<b>Step 6 Communication of IMP.....</b>	<b>10</b>
<b>Step 7 Review and Continual Improvement .....</b>	<b>11</b>



## Introduction

Sustainable Golf The benefits of Integrated Management Planning
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### Sustainable Golf

Golf facilities, like any other businesses need to be managed in a sustainable way to provide the best quality service to members and visitors for the best value for money.

The ever increasing impacts of Climate Change, the rising costs of resources such as power and water, the increasing amount of legislation and regulations to meet, and the high member and public expectations, need to be addressed and should be the motivating factor for successful businesses to be proactive and get on top of their environmental performance.

The key asset of any club is the golf course itself so it is vital that this is of the highest possible quality to retain and attract members and visitors. In addition to quality playing surfaces, issues such as nature conservation and enhancement, landscape and cultural heritage, sustainable turf management, water resource management, pollution prevention, waste minimisation and energy efficiency all need to be addressed.

Clubhouses, maintenance facilities, professional shops and other built elements are areas where efficiencies and cost savings can be addressed such as water and waste management, and energy efficiency.

Addressing all these **environmental** issues in conjunction with making your golf facility, **efficient, cost effective, profitable** and **socially inclusive** will enable you to have a more sustainable and successful business.

### The benefits of Integrated Management Planning

Adopting an integrated management planning process at your golf facility is a **fundamental** component of managing **future environmental management operations**. It is the key to ensuring that the **environmental issues** relating to the management of the course and buildings are properly **co-ordinated, documented, evaluated and understood**. Through this process the facility can ensure that future actions will be appropriate, and not unwittingly detrimental.

Having an Integrated Management Plan (IMP) document will act as both a permanent record and reference, and will give a positive and progressive steer to the way the facility will function in the future. In the long term, it will assist in financial planning, and aid communication and continuity in the event of changes in staff and committee members.

It will benefit and enable the golf facility to:

- i. **Summarise** and bring **clarity and structure** to the **wide range of environmental issues** relevant to the whole golf facility.
- ii. **Protect and enhance** the **natural and cultural heritage** of the golf course through:
  - taking an **holistic, long term integrated approach** to managing the **playing areas** and **surrounding environment**
  - **identifying** and maintaining **existing good practice**
  - **anticipating inadvertent mis-management and wasteful practices and so being able to avoid it**
  - to ensure pollution is prevented and full **legal compliance**
  - **increasing knowledge and understanding** amongst staff, committees, members, and visitors
- iii. Ensure **efficient resource and utility management** methods in the facility buildings leading to potential **cost savings**.
- iv. Identify sources of **advice, funding** and **other resources** through appropriate **partnerships**.
- iv. Drive **performance, improve forward planning, continuity of management approach** and co-ordination of available resources.
- vi. Increase **membership and visitor numbers** by gaining respect locally and nationally, and raising member, visitor and local community awareness of the Clubs stewardship of the golf facilities.
- vii. Facilitate active **participation in other golfing and environmental initiatives** e.g. Local Biodiversity Action Plans, River Basin Catchment Plans, national surveys, Scottish Golf Environment Certificates and Golf Environment Organisation (GEO) Certification.

## Step by Step Guide

The Integrated Management Planning (IMP) Process	
Step 1	Environment Team
Step 2	Environmental Policy
Step 3	Self Evaluation
Step 4	Further Advice
Step 5	Integrated Management Plan (IMP) documents
Step 6	Communicating the IMP
Step 7	Review and Continual Improvement

### The Integrated Management Planning (IMP) Process

Many industries follow the internationally recognised European Eco-Management and Audit Scheme (EMAS) methodology for producing Environmental Management Plans. The process described in this document takes the **key principles of EMAS** and gives guidance as to how this can be effectively applied to the golf sector.

Management Plans for Golf Courses are typically set up to cover a **3 to 5 year period**, with a rolling programme of follow-on plans thereafter.

These management plans emphasise the logical, planned process of **Audit, Evaluation and Action**, resulting in working plans from which successive committees and green staff can develop more specific annual action plans.

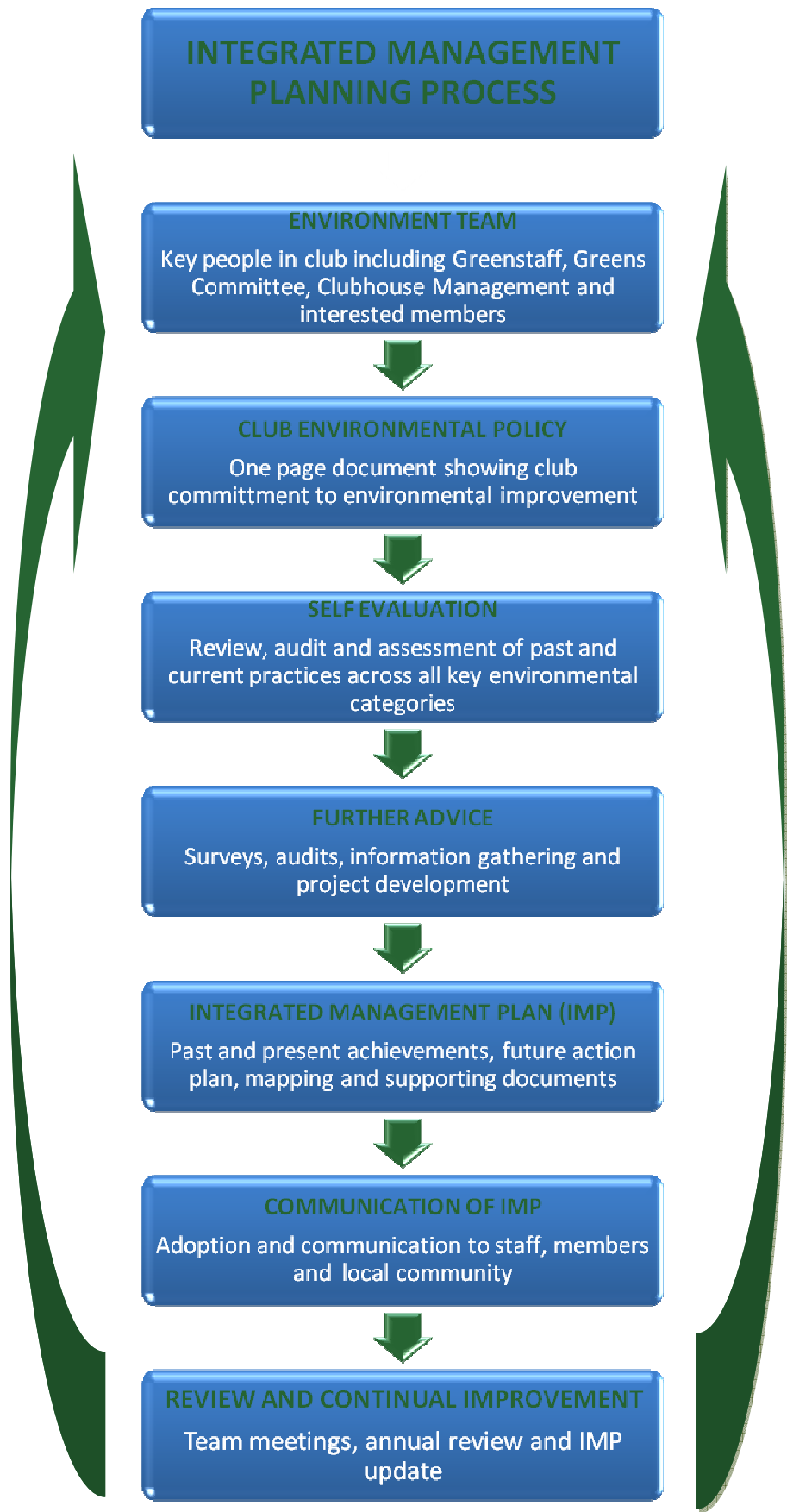
The first time of producing an Integrated Management Plan undoubtedly involves more **concentrated input** than rolling follow-on plans.

There is quite a lot of information to be pulled together and **forward thinking** to be done, which may seem overwhelming at the outset though each club can decide its **own timescale** and pace for completing the process.

Those who have gone through the process find the end result very rewarding both in a greater understanding and awareness of the issues involved and in a sense of positive contribution, achievement and progress.

This Management Planning document is designed to provide **step by step guidance** on how to produce a tailor-made IMP plus there are templates available to help and to use once the IMP is operational.

The following flow chart shows the steps in the Integrated Management Planning Process as recommended by SGEG:



## Step 1 Environment Team

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It is strongly recommended that golf clubs operate their Environmental Programme through a dedicated Environment Team or Working Group. If the environmental programme is driven by just one individual the continuity and breadth of environment projects are ultimately vulnerable to resource and time restrictions, and future changes in staff and committee members.

With an Environment Team there are:

- A variety of people from different departments and members with different ideas, knowledge, special interest expertise and contacts
- More people and man-hours to share practical and administrative tasks
- Wider range of activities achievable
- More people to spread the word and moral support

## Step 2 Club Environmental Policy

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It is important to have a high level demonstration of the Club's commitment to the Environment Programme from the beginning. This should be in the form of a **one page** Environmental Policy document stating overall philosophy, vision and aims for the environmental management of the facility.

It *should* include a commitment to:

- Implement environmental best practice across the facility to minimise the impact of operations on the environment and a statement of intent to improve
- Be compliant with relevant legislation and regulations
- Optimise resource efficiency across the whole facility
- Provide appropriate environmental training
- Communicate environmental programme at all levels
- Increase environmental awareness among facility users and the wider community

Once signed and endorsed by the Golf Club Committee, the Environmental Policy should be displayed, communicated and adopted by all employees of the facility including: the Club management, the golf course management staff and sub-contracted employees such as in catering and the pro-shop.

*Example Environmental Policies are available from SGEG*

## Step 3 Self Evaluation

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Before looking to the future, it is important that the Environment Team / Group has an honest understanding of past and current activities and achievements, strengths and weaknesses, highlighting areas of success and areas to be improved.

SGEG have developed a **Self Evaluation Matrix (SEM)**, a visual tool for evaluating where the club's management of different categories sits at any given time relative to the standards set in the Scottish Golf Environment Certificates scheme. The criteria in this scheme are to the Golf Environment Organisation (GEO) Certification scheme international standard and will

give your facility a guide as to where to aim. GEO have also developed an online self assessment tool which can be found at [www.golfenvironment.org](http://www.golfenvironment.org).

Use of the SEM could be done in conjunction with SGEG at the outset, on an ongoing basis or annually, (perhaps to determine feasibility of certificate application) or at the end of the IMP to show progress over the period of its operation.

*A Self Evaluation Matrix is available from SGEG*

#### Step 4 Further Advice

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Having a good understanding of what habitats, species and management practices are in place at present is vital before future improvements can be planned. Further environmental **audits and surveys** could include habitat surveys, species surveys, waste, water and energy audits. SGEG can assist with organising these and help with sourcing funding to support those that are not provided free of charge by the Government.

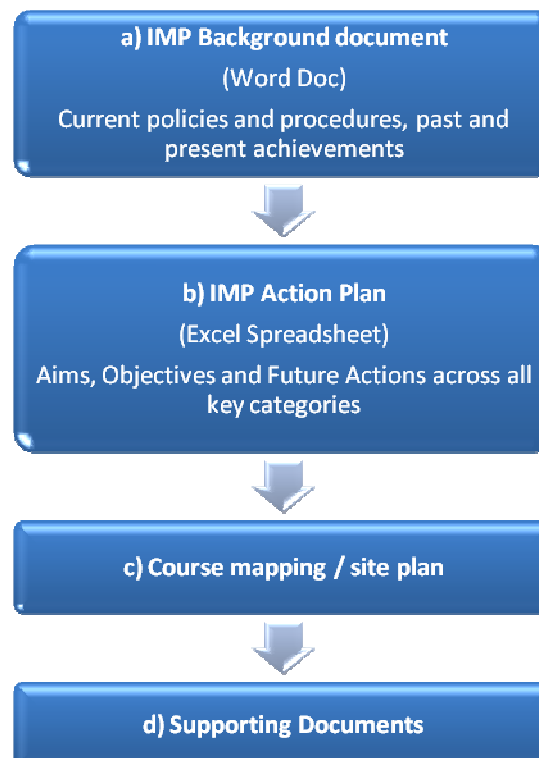
It is your responsibility to ensure that you are aware of all legislation and regulations that apply to your facility to ensure that all operations are legally compliant. SGEG have a list of key environmental legislation relevant to golf courses but for full up to date information see [www.netregs.co.uk](http://www.netregs.co.uk).

*Register of Key Environmental Legislation is available from SGEG*

#### Step 5 Integrated Management Plan (IMP) Documents

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The IMP documents pull together the existing knowledge of the facility and your aims for where you want to be in the future along with plans of how you are going to reach those goals. There is also no one style of IMP or a single mechanism for developing one however SGEG recommend it comprises of the following four sections:



### a) IMP Background document (Current Policies and procedures, past and present achievements)

The first document should give an introduction to the club along with policies, procedures and past and present achievements in each of the key management categories. We suggest you base these around the Scottish Golf Environment Certificates scheme, namely:

- Environmental Management Planning
- Education & Awareness
- Nature Conservation
- Landscape & Heritage
- Turfgrass Management
- Water and Wastewater Management
- Waste Management
- Energy Efficiency

SGEG have produced a **template** which gives a ready-to-use framework for addressing not only all the categories as broad headings, but incorporating the certification criteria as a whole. Clubs which do not wish to create their own style and format of IMP can use the SGEG template, either using it in its entirety or adopting and adapting the components and wording as it wishes.

*IMP Background document template is available from SGEG*

### b) IMP Action Plan

An IMP is nothing unless it is translated into a scheduled programme of work in which progress can be continually monitored.

This Action Plan is a **spreadsheet** of **aims, objectives and actions for the future**, a 'working' document which can be used both to prompt the work and record when it has been done.

The Action Plan also identifies the individuals or groups who will take the lead **role and responsibility** for each planned action. It also flags up what **resources** are available or required before the action can be implemented.

Although the issues in the IMP are set out under the separate categories listed previously, many of the issues and actions are **interrelated** and have implications in more than one category. For example, and planned action for reduction in mowing in certain areas of the course may be detailed in the turf category of the plan, but will have impacts on the nature category (*increase in grassland habitat*), landscape (*improvements to aesthetic quality of a hole*), water (*potential reduction in drainage problems*), waste (*reduction in green waste produced*) and energy (*reduction in fuel used in machinery*).

In the cross-categorising columns provided in the action plan template, solid black circles can be used to denote the categories in which the action has a major impact, an unshaded circle used to denote where it has a more minor impact and the other categories left blank.

SGEG advise that the club take the Scottish Golf Environment Certificates criteria into consideration for ideas when preparing future actions.

*IMP Action Plan Template is available from SGEG*

*Scottish Golf Environment Certificates- Procedure and Criteria available from SGEG*

### c) Course Mapping/Site Plan

A **site layout plan, aerial photography or a mapping system**, whether digital or paper-based, is an extremely useful tool in developing and implementing an IMP. It provides an ideal way of allocating and scheduling areas and zones to be managed, and a useful visual means of communication to others. **Photography** will also be valuable for recording and monitoring over time.

By having your course digitally mapped, areas can also be electronically calculated and quantities of materials and chemicals can be monitored more accurately. It is an easy way to clearly demonstrate to members and visitors future works. SGEG can assist clubs in procuring Mapping Consultants and in detailing a brief of their requirements.

### d) Possible Supporting Documents

(Clubs are NOT expected to have all of the following documents!)



## MANAGEMENT PLANNING

1. Environmental Policy document
2. Environment Team meeting notes and Review forms
3. Course Development and Improvement Plan
4. Scottish Golf Environment Group Reports
5. Current SGEG / GEO Certification Criteria
6. Register of Environmental Legislation
7. Self Evaluation Matrices
8. Any relevant in-house Club/Local Authority/Company policy documents
9. Special documentation e.g. National Park Development/Management Plan
10. Any previous IMPs
11. Any previous Environmental Award Statements or Award Resubmission Forms



## EDUCATION & AWARENESS

12. Health and Safety Manual
13. Emergency / Pollution Incident Plan
14. Key contact details / suppliers



## TURF

15. Course/Turfgrass Maintenance Programme/Regime
16. Fertiliser Programme
17. Pest and Disease Tolerance Thresholds / Matrices
18. Drainage plan/record/proposals
19. Agronomist Reports



## WATER

20. SEPA Abstraction Licence
21. SEPA Discharge consent
22. Scottish Water business agreements

23. Water sample analyses
24. Rainfall records



## NATURE

### **Designations**

25. SSSI site citation sheet
26. SAC documentation etc

### **Surveys**

27. Formal Habitat Surveys, e.g. Phase 1 and 2 (date)
28. Anecdotal Species Lists/records
29. Pre-development ecological assessment
30. National or Regional Survey forms (e.g. Scottish Squirrel Survey, Biological Record Centre reporting forms etc)

### **Reports**

31. Ecology Reports/Pre development Ecological Reports
32. SGEG Summary Environmental Report

### **Subject Management Plans**

33. Woodland Management Plan
34. Pond Management Plan
35. Gorse Management Plan

### **Projects**

36. Nature Conservation Project reports or plans

### **General**

37. Local Biodiversity Action Plan excerpt



## LANDSCAPE & HERITAGE

### **Designations**

38. RIGGS documentation
39. NSA, AGLV, other documentation
40. Scheduled Ancient Monument documentation
41. Archaeological Site/Record Sheets
42. Listed Building documentation

### **Surveys and Reports**

43. Landscape Appraisal
44. Cultural Heritage Report
45. Archaeological Desktop Study/Pre-development Archaeology Reports
46. Historic Building Survey/Renovation Plan (e.g. Doocot, Icehouse, Victorian culvert)
47. Club Centenary Book
48. Old course layout maps
49. Local town/area History Sheets
50. Hole Name Origins



## WASTE

51. Waste Audit Application Form
52. Preliminary In-house / Envirowise Waste Audit reports
53. Special advisory reports (e.g. composting)
54. Club Waste Management Strategy

55. DIY Waste Stream Evaluation and Record(units and £)



- 56. Energy Audit Application Form
- 57. Preliminary In-house / Energy Saving Trust Energy Audit reports
- 58. Energy Saving Trust (or other) Energy Audit Report
- 59. Special advisory reports (e.g. wind turbine, solar panels)
- 60. Club Energy Efficiency Strategy
- 61. Energy recording sheets (units and £)

## Step 6 Communication of IMP

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Once prepared, it is important that the IMP documents are properly adopted, communicated and put into practice.

- **Staff** need to be communicated with at all stages of the Environmental Management Planning process. Key individuals will be invited to participate in the process as appropriate. The final draft Management Plan should be **circulated** within the whole facility for **information** and to **feed back** to the Club Committee prior to their endorsement of the plan.
- **The Club Committee** should give the final plan its **full and unconditional endorsement** and ensure that it will be continually drawn upon by successive committees, managers and greenstaff.
- **Members, visitors** and **staff** should have **access to the adopted Management Plan** and other **supporting information**, to communicate the proposed environment programme. Letting members know plans in advance should help with understanding why key environmental actions are taking place and reduce opposition. It will also send out a positive message that the club is endeavouring to run as efficiently as possible, and emphasis the message that good environmental management means good quality golf and good value for money.
- The Integrated Management Plan can help communicate **outwith the facility** to the local community and external interested parties and help demonstrate the facility's commitment to environmental stewardship.

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## Step 7 Review and Continual Improvement

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Having an Environmental Policy, an Environmental Team, lots of data and future actions in a well communicated IMP is not the end of the process. It is important that the facility continually uses the Action Plan, improves and keeps up to date with new practices and technologies. The Environmental Team should meet once a year at the very least, where progress will be **reviewed and monitored** with appropriate advice and consultation and the **Action Plan updated for the year ahead with new practices and planned projects**. The Self Evaluation Matrix should be revisited annually to show the progress that has been made and reported back to committees and at the AGM. Continual **communication of success** will help gain additional support from members and other interested parties.

The IMP should be set up initially for **a set number of years – usually between 3 and 5 years**. **In the final year of that period**, the Club will formally review the Steps 1 to 7, what has been achieved and how well the systems and processes have worked. A **follow-on plan** will then be prepared for a further set number of years. This will be done in consultation throughout the facility and externally as necessary.

*IMP Report template is available from SGEG*

Facilities could monitor and benchmark their progress using environmental performance indicators or online benchmarking tools such as the free system provided by The R&A at [www.bestcourseforgolf.org](http://www.bestcourseforgolf.org).

If, while using the SGEG Self Evaluation Matrix you feel your facility has reached level 4, they may wish to go for external recognition such as the Scottish Golf Environment Certificates or onto the GEO Certification scheme.



For full information and criteria go to: [www.sgeg.org.uk](http://www.sgeg.org.uk).

## The next step....

If adopting an Integrated Management Planning approach to create an **environmentally responsible, efficient, cost effective, sustainable business** is the next step you would like to take at your golf facility, please get in touch with SGEN to get more advice and our useful templates.



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