ORGANISATION PLANNING **TOOL KIT**

Organisation name:

Organisation Purpose:
(Why do we exist?)

COMMITTEE MEMBERS			
Position	**Name**	**Email**	**Phone**
President			
Vice President			
Secretary			
Treasurer			

Lease expiry date:

MEMBERSHIP NUMBERS				
Junior Male	**Junior Female**	**Senior Male**	**Senior Female**	**Social/Club Members**

CHECKLIST		
What?	**When?**	**Submitted?**
Check Status with Office of Fair Trade (OFT)	Annual update with OFT	☐ yes ☐ no
Certificate of Currency (Public Liability)	Annual or on Renewal	☐ yes ☐ no
Liquor Licence *If applicable*	Annual or on Renewal	☐ yes ☐ no
Gaming Licence *If applicable*	Annual or on Renewal	☐ yes ☐ no
Certificate of Content Insurance	Annual or on Renewal	☐ yes ☐ no
Calendar of Events	Start of the season	☐ yes ☐ no
AGM Minutes	After AGM meeting	☐ yes ☐ no
Audited Financial Report	After AGM meeting	☐ yes ☐ no
Completed Org. Tool Kit sent to LCC	After AGM meeting	☐ yes ☐ no

Committee Use:			
Date Completed		Date Approved by Committee	

HOW TO USE THE PLANNING TOOL KIT

Use this planning tool kit as a living document at your committee meetings and encourage input from members.

Use the **S.M.A.R.T** tool when planning your strategies and actions:

Specific – to your organisation

Measurable – How will you know you have reached your outcome

Agreed – all the committee, volunteers and players (as appropriate)

Realistic – timeframes, budget

Timed – when you plan to achieve the outcome

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ORGANISATION PLANNING **TOOL KIT**

BETTER ORGANISATIONS

COMPLETE THIS SECTION INCORPORATING FEEDBACK FROM YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
What is your current membership?	What is your ideal number of members?
Do you have enough volunteers?	How many volunteers do you need and what duties do you need them to perform?
Do you have sufficient financial resources to run your organisation?	What financial resources do you need to run your organisation?
How effective are your management and administration procedures?	What management and administration – processes and procedures do you need to improve?

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BETTER FACILITIES

COMPLETE THIS SECTION INCORPORATING FEEDBACK FROM YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
How would you rate each component of your facility? (clubhouse / lights / change room / kitchen / toilets, etc)	What facility upgrades or new facilities do you need to run your organisation?
How would you rate the state of your field(s)/court(s)? (If applicable)	What facility maintenance do you need to complete to run your organisation? (If applicable)
How would you rate the condition of your organisation equipment?	What equipment do you need to run your organisation?

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BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

MEMBERSHIP							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			☐	☐	☐		
			☐	☐	☐		
			☐	☐	☐		
			☐	☐	☐		
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			☐	☐	☐		
			☐	☐	☐		

ORGANISATION PLANNING **TOOL KIT**

BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

VOLUNTEERS							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			☐	☐	☐		
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ORGANISATION PLANNING **TOOL KIT**

BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

FINANCES							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
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ORGANISATION PLANNING **TOOL KIT**

BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

FACILITY MAINTENANCE							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
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ORGANISATION PLANNING **TOOL KIT**

BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

FACILITY UPGRADE							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			☐	☐	☐		
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BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

CLUB EQUIPMENT							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
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BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

MANAGEMENT AND ADMINISTRATION							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
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ORGANISATION PLANNING **TOOL KIT**

BETTER OUTCOMES

TO BE COMPLETED IN CONSULTATION WITH YOUR SPORT AND RECREATION OFFICER

OTHER							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			☐	☐	☐		
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ORGANISATION PLANNING **TOOL KIT**

FINANCIAL PLAN

YEAR:

USE THIS SECTION TO LIST ALL EXPECTED INCOME AND EXPENDITURE – THIS WILL HELP YOUR CLUB/ORGANISATION PLAN FOR FUTURE EXPENDITURE AND TO PREVENT SHORTFALLS.

INCOME					
	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Estimate Annual
Activity related income					
Registration fees					
Game fees					
Potential income					
Clothing / uniform / merchandise sales					
Facility hire					
Fundraising					
Sponsorship					
Canteen sales					
Bar sales					
Coaching clinics					
Gate takings					
Total income					

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EXPENDITURE					
	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Estimate Annual
Activity related expenditure					
Accountancy & audit					
Game fees Affiliation fees to State Organisation					
Advertising & signage					
Bank fees & charges					
Permits & licenses					
Postage					
Printing & stationary					
Cleaning & waste removal					
Electricity					
Lease fees					
Insurance					
Rates					
Telecommunication					
Website maintenance					
Field/court maintenance & repairs					
Facility maintenance & repairs					
Equipment/replacement					
Team/Player expenses					
Coaching clinics					
Canteen stock					
Uniform					
Presentation day					
Trophies					
Potential expenditure					
Sinking fund					
Fundraising expenses					
Sponsorship signage					
Cost of goods for sale					
Total income					
Total expenditure					
Estimated profit/loss					

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