



COMMUNITY ORGANISATION PLANNING TOOL KIT

Version 1

Organisation name:

Organisation Purpose:
(Why do we exist?)

MANAGEMENT COMMITTEE

Position	Name	Email	Phone
President			
Vice President			
Secretary			
Treasurer			

Lease expiry date:

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.

CHECKLIST

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

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

Committee Use:

Date Completed		Date Approved by Committee	
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COMMUNITY 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?
Do you have enough volunteers?	How many volunteers do you need and what duties do you need them to perform?
What programs/services does your organisation currently run?	What programs/services would you like to run in the future?
What sources of funding does your organisation access to deliver your programs/services to the community?	What other sources of funding do you need to continue to deliver you programs/service?
What other organisations do you partner with to deliver your programs/services?	Who are your potential partners that you could work with to deliver your programs/services?



COMMUNITY ORGANISATION PLANNING TOOL KIT

BETTER ORGANISATIONS (CONT.)

COMPLETE THIS SECTION INCORPORATING FEEDBACK FROM YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
What management and administration procedures do you currently have in place to operate your organisations?	What management and administration – processes and procedures do you need to improve?
What are the emerging trends in your community?	What do you need to do to meet those needs?
What challenges does your organisation face in the delivery of your core business?	What strategies do you have in place to overcome those barriers?



COMMUNITY ORGANISATION PLANNING **TOOL KIT**

BETTER FACILITIES

COMPLETE THIS SECTION INCORPORATING FEEDBACK FROM YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
<p>How would you rate each component of your facility? (clubhouse / lights / change room / kitchen / toilets, etc). Does this meet your organisation needs?</p>	<p>What facility upgrades or new facilities do you need to run your organisation?</p>
Empty space for user input	Empty space for user input



COMMUNITY ORGANISATION PLANNING TOOL KIT

BUDGETING TOOL

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	
	Estimate Annual
Activity related income	
Donations	
Fundraising	
Grants	
Memberships	
Promotion	
Room Hire	
Services	
Tea/Coffee	
Potential income	
Facility hire	
Fundraising	
Sponsorship	
Total income	

EXPENDITURE

Estimate Annual

Activity related expenditure

Accountancy & audit

Advertising

Bank fees & charges

Postage

Printing & stationary

Cleaning & waste removal

Electricity

Lease fees

Insurance

Rates

Telecommunication

Website maintenance

Facility maintenance

Potential expenditure

Sinking fund/contingency fund

Fundraising expenses

Total income

Total expenditure

Estimated profit/loss