



# COMMUNITY ORGANISATION PLANNING TOOL KIT

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	
----------------	--	-------------------------------	--



# 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.**

<b>Where are we now?</b>	<b>Where do we want to be?</b>
<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 ORGANISATION PLAN FOR FUTURE EXPENDITURE AND TO PREVENT SHORTFALLS.**

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

**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**