



COMMUNITY ORGANISATION PLANNING TOOL KIT

Organisation name:

Organisation purpose:

MANAGEMENT COMMITTEE			
Position	Name	Email	Phone

Lease expiry:

No. of Paid Members	No. of Paid Workers	No. of Volunteers

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

LEASE KPI CHECKLIST		
What?	When?	Submitted?
Provide completed Toolkit	Annual (Version)	Yes No
Current membership/volunteer details	Annual	Yes No
Provide Financial plan	Annual	Yes No
Provide last AGM minutes	Annual	Yes No
Provide audited Financial Statements	Annual	Yes No
Provide Public Liability Certificate	Annual	Yes No
Attend "Annual Lessee" workshop	Annual	Yes No
Provide Yearly Calendar (activate space)	Annual	Yes No
Maintain facility - Visual Inspection	Annual	Yes No
Provide Dispute Resolution Process	Annual	Yes No
Provide Constitution/By-Laws/Rules	Annual	Yes No
Provide Liquor Licence (as req)	Annual	Yes No
Provide Gaming Licence (as req)	Annual	Yes No
Comply with Office of Fair Trade	Annual	Yes No

Date Completed	Date Approved



ORGANISATION PLANNING TOOL KIT

BETTER ORGANISATIONS

PLEASE CONSULT WITH YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
<p>What are your volunteer's current roles and responsibilities?</p>	<p>Ideally how many volunteers would assist in moving your organisation forward? What would their roles be?</p>
<p>What programs/services do you offer the community?</p>	<p>What programs/services would you like to offer in the future?</p>
<p>What source of funding does your organisation access to deliver your programs/services?</p>	<p>What other sources of funding do you need to continue or increase delivery your programs/services?</p>
<p>What organisations do you partner with to deliver your programs/services?</p>	<p>Who are your potential partners that you could work with to deliver your programs/services?</p>



ORGANISATION PLANNING TOOL KIT

BETTER ORGANISATIONS

PLEASE CONSULT WITH YOUR COMMITTEE AND MEMBERS.

Where are we now?	Where do we want to be?
<p>What management & administration procedures do you have to operate your organisation?</p>	<p>What management & administration processes/procedures could be improved?</p>
<p>What are the emerging trends in your community?</p>	<p>What do you need to do to respond to these trends?</p>
<p>What challenges does your organisation face?</p>	<p>What strategies/plans does your organisation have in place to overcome those challenges?</p>



ORGANISATION PLANNING TOOL KIT

BETTER FACILITIES

Where are we now?	Where do we want to be?
<p>Does your facility currently meet your communities need? If no, please specify:</p>	<p>How will you make these improvements or upgrades to meet the communities facility needs?</p>



ORGANISATION PLANNING TOOL KIT

BETTER OUTCOMES

VOLUNTEERS							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



ORGANISATION PLANNING TOOL KIT

BETTER OUTCOMES

PROGRAMMING							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

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ORGANISATION PLANNING TOOL KIT

BETTER OUTCOMES

GOVERNANCE							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



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BETTER OUTCOMES

FACILITY							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



ORGANISATION PLANNING TOOL KIT

BETTER OUTCOMES

OTHER							
Goal	Action	Person Responsible	Timeframe			Estimated Budget	Progress
			Short (12 mo)	Medium (1–3 yr)	Long (3–5 yr)		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		



ORGANISATION PLANNING TOOL KIT

FINANCIAL PLAN
YEAR:

PLEASE LIST ALL EXPECTED INCOME AND EXPENDITURE –
 TO 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
Confirmed Income					
Potential Income					
Total income					

EXPENDITURE					
	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Estimate Annual
Additional					
Total income					
Totalexpenditure					
Estimated profit/loss					