



# 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:

## 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.

## 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	<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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# 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?
<p>What is your current membership?</p>	<p>What is your ideal number of members?</p>
<p>Do you have enough volunteers?</p>	<p>How many volunteers do you need and what duties do you need them to perform?</p>
<p>Do you have sufficient financial resources to run your organisation?</p>	<p>What financial resources do you need to run your organisation?</p>
<p>How effective are your management and administration procedures?</p>	<p>What management and administration – processes and procedures do you need to improve?</p>



# 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?
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?





















# 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
<b>Activity related income</b>					
Registration fees					
Game fees					
<b>Potential income</b>					
Clothing / uniform / merchandise sales					
Facility hire					
Fundraising					
Sponsorship					
Canteen sales					
Bar sales					
Coaching clinics					
Gate takings					
<b>Total income</b>					

## EXPENDITURE

	Jan to Mar	Apr to Jun	Jul to Sep	Oct to Dec	Estimate Annual
<b>Activity related expenditure</b>					
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					
<b>Potential expenditure</b>					
Sinking fund					
Fundraising expenses					
Sponsorship signage					
Cost of goods for sale					
<b>Total income</b>					
<b>Total expenditure</b>					
<b>Estimated profit/loss</b>					