(Organisation)

Sample Business / Strategic Plan for the Period

(Date) - (Date)

This is a sample business plan only, there will be some components that won’t apply to every group or organisation and there will be additional items peculiar to each organisation and/or their circumstances that would need to be included.

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# Executive Summary:

Your executive summary (suggested not longer than a page) should focus on the key objectives and expected outcomes for the coming year/s. The content provided below should briefly summarise the more detailed information throughout the body of the plan.

This (date) Business Plan has been endorsed by the (Organisation) Committee at the (date) committee meeting.

Signed:…………………………………………… Date:…………………….

 (Chairperson/President)

# Mission Statement

What is the purpose of your Organisation?

# Organisation Overview

* Key activities and services provided
* Future Goals
* Partnerships (these could be peak body associations, sponsors, business, government departments and individuals).
* Business opportunities / competition.

# Situational Analysis

## Community Analysis

Provide an overview of the makeup of your local community and their needs.

## SWOT Analysis

|  |  |
| --- | --- |
| **Strengths**Dot point analysis of (Organisations) strengths | **Weaknesses**Dot point analysis of (Organisations) weaknesses |
| **Opportunities**Dot point analysis of (Organisations) opportunities | **Threats**Dot point analysis of (Organisations) threats |

As a result of the above analysis summarise your (Organisations) situation.

# Personnel Plan

|  |  |  |
| --- | --- | --- |
| **Name** | **Position** | **Qualifications / Experience** |
|  |  |  |

# Risk Management Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk** | **Likelihood of occurrence1**High / Medium / Low | **Severity of occurrence2**High / Medium / Low | **Risk rating3**High / Medium / Low | **Actions to address** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1 What are the chances of this risk occurring?

2 What level of impact would the risk have on your operations?

3 Based on the matrix below, what would this rating of this risk be?

|  |  |
| --- | --- |
| **Likelihood of occurrence** | **Severity of occurrence** |
| **High** | **Medium** | **Low** |
| **High** | High | High | Medium |
| **Medium** | High | Medium | Low |
| **Low** | Medium | Low | Low |

# Succession Plan

## Office-bearers

### Term of office:

* Members of the Committee will be elected for a minimum term of 1 year and a maximum term of (time) year/s
* It is expected that the Vice President will at some point move into the President’s position.
* Office bearers will be required to give a period of (time) notice if resigning from their position mid-term.

### Recruitment Strategy:

Members of the committee will actively identify and recruit new committee members by:

* Identifying potential office bearers through contact with their members
* Encouraging interest from potential committee members by inviting them to meetings and providing them with information about the role, duties and expectations of committee members through information packages, including duty statements and relevant polices and other information provided at monthly meetings
* Looking for an even cross section of the community with some consideration given to gender, age, accomplishments, occupation, nationality, longevity with the community and familial arrangements.

### Change of Office-bearers:

* Induction/Changeover period. It is expected that outgoing office-bearers will offer ongoing support and mentoring to the new position holder.
* Change of signatories with bank accounts (need a copy of the minutes)
* Change of details with ATO, peak bodies and other stakeholders
* Notify members and announce to the community (social media, print media, website)
* New committee members will be given a governance package (file) that will include
	+ Current copy of the constitution, business plan and any other policies and procedures
	+ Current copy of Committee Members and their contact details
	+ List of Meeting dates
	+ Access to previous financial reports, agendas and minutes
	+ Most recent Audit report
	+ Committee members are expected to keep their file updated and in a safe and secure location. They must bring this file to every meeting and return it when they retire/resign from the committee.

### Skills, Attributes and Code of Conduct:

The (Organisation) Committee will identify the skills and attributes required in new Committee members

* All committee members will agree to attend Governance training when offered and adhere to good governance guidelines.
* The committee member should use the powers of office for a proper purpose, in the best interests of the (organisation) as a whole but may, where appropriate; have regard for the interest of other stakeholders of the company.

# Members

* The (Organisation) will actively pursue new members
* All members will be treated inclusively, and given equal opportunity to utilise the (Organisations) facilities
* All members will have access to a copy of the (Organisations) constitution and any material as dictated by the Association Incorporation Act 2015
* Members will fulfil their financial obligations to the (Organisation) and will act honestly, in good faith and in the best interests of the (Organisation) as a whole.

# Financial Plan

|  |
| --- |
| **(Organisation) Budget (Date)** |
| **Expenses** |  | **Income** |  |
| Affiliation Fees |  | Memberships |  |
| Equipment |  | Raffles |  |
| Rent |  | Catering |  |
| Stationery |  | Other |  |
| IT |  | Grant Funding |  |
| Utilities |  | Sponsorship |  |
|  |  |  |  |
| **TOTAL** |  |  |  |