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| --- |
| Document PurposeAn Organisational Plan provides internal stakeholders with a thorough understanding of your organisation’s composition and future intentions. It provides a link between your Strategic and Operational Plans.Instructions for Completion This front page is to guide users in creating their document.  Please **delete** this table once your document has been approved and finalised.  To complete the document:   * Update or delete all the green highlighted sections in this document * Update the document code and/or version number to suit your organisations naming convention * Removed QCOSS branding and replaced it with your organisation’s branding * Updated the header and footer of this document * Removed this page/table from your final version * Submit the document for approval with the Board of Directors. |

(Organisation Name)

Organisational Plan

Date: (Date)

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# Executive summary

The Executive Summary provides an overview of the key points contained in the Plan. Key information includes:

* The purpose of the organisation – Mission and Vision
* Where the business is in its current lifecycle - startup, growing, redirection
* The key products or services delivered
* Reason for developing the Plan and how it will be used
* Brief description of your future goals
* Financial Forecast - key figures.

# Business background

## Organisation profile

|  |  |
| --- | --- |
| **ENTITY NAME** | (Enter as described in Australian Business Register) |
| **ENTITY TYPE** | (Enter as described in Australian Business Register - e.g. Company, Trust, Co-operative, Partnership) |
| **ABN#** | (Enter ABN) |
| **DATE ABN REGISTERED** | (Enter date as described in Australian Business Register) |
| **DATE ORGANISATION ESTABLISHED** | (Enter date if different from “Date ABN Registered”) |
| **REGISTERED FOR GST** | Yes/ No (as described in Australian Business Register) |
| **ACNC REGISTERED CHARITY** | Yes/ No (as described in ACNC Charity Register) |
| **WHO THE CHARITY HELPS** | (Enter as described in ACNC Charity Register) |
| **CHARITY TAX CONCESSION STATUS** | (Enter as described in Australian Business Register) |
| **DEDUCTIBLE GIFT RECIPIENT STATUS** | (Enter as described in Australian Business Register) |
| **LOCATION OF CONSTITUTION** | (Enter URL or file path)) |

## Key contacts

|  |  |
| --- | --- |
| **CONTACT NAME** | (Enter contact name) |
| **CONTACT POSITION** | (Enter contact job title) |
| **TELEPHONE** | (Enter contact landline number) |
| **MOBILE** | (Enter contact mobile phone number) |
| **EMAIL** | (Enter contact email) |
| **POSTAL ADDRESS** | (Enter Postal Address) |
| **HEAD OFFICE ADDRESS** | (Enter Physical Address) |

## Governance

|  |  |
| --- | --- |
| **GOVERNANCE STRUCTURE** | (Confirm whether the organisation is governed by committee, board, etc.) |
| **# OF GOVERNANCE TEAM MEMBERS** | (Enter number of sitting members needed as per constitution) |
| **CONTACT NAME** | (Enter contact name) |
| **CONTACT POSITION** | (Enter contact job title) |
| **TELEPHONE** | (Enter contact landline number) |
| **MOBILE** | (Enter contact mobile phone number) |

## Online

|  |  |
| --- | --- |
| **WEBSITE** | (Enter URL) |
| **LINKEDIN** | (Enter URL) |
| **FACEBOOK** | (Enter URL) |
| **INSTAGRAM** | (Enter URL) |
| **TWITTER** | (Enter URL) |

# History

Brief overview of your organisation history including:

* Founders
* Time and purpose of business foundation
* Major changes in name or location
* Development, progress and success of major products and services

# Business scope

(Organisation) delivers the following products and services

|  |  |
| --- | --- |
| **Program/ Product** | **Description** |
| (Program Name) | (Status and Description) |
| (Program Name) | (Status and Description) |
| (Program Name) | (Status and Description) |

## Locations

List your current operating locations and or regions.

For organisations with multiple locations or who provide services primarily in the community, you may specify your Head Office location, and provide a summary of other operating locations or geographic regions.

## Strategic goals

Insert Goals as described in the Strategic Plan and summarize how they will be achieved:

* Why you chose these Strategic Goals
* The resources and expertise required to achieve the Strategic Goals
* What methods will be used to action the Goals.
* The Critical Success Factors in achieving these Goals

Insert the Strategic Plan as an Appendix.

## Intellectual property (IP)

Highlight any unique intellectual property of the organisation that adds to its value and requires specific protection. This may include:

* Trademarks
* Patents
* Unique methods of developing or delivering products or services

## Information technology

Summarize your:

* Policies and Practices
* Current and future hardware and software requirements
* Resources and expertise

## Organisational structure

Summarize your:

* organisational structure
* Operational or team staffing structure

Insert and Organisational Chart as an Appendix, naming key leaders.

## Staff pay, retention and recruitment

Summarize your:

* Approach to pay, retention and recruitment
* Identify key awards, agreements, or specific employment conditions

# Swot analysis

|  |  |
| --- | --- |
| **Strengths** | *I will maximise them by:* |
| (Notes) | (Notes) |
| (Notes) | (Notes) |
| **Weaknesses** | *I will mitigate them by:* |
| (Notes) | (Notes) |
| (Notes) | (Notes) |
| **Opportunities** | *Can be maximised by:* |
| (Notes) | (Notes) |
| (Notes) | (Notes) |
| **Threats** | *Can be mitigated by:* |
| (Notes) | (Notes) |
| (Notes) | (Notes) |

# Industry research

## Key clients groups

Identify the key clients of your products and services. This includes:

* Description of your typical clients or industry segments
* Eligibility or qualification requirements to access your services
* Client motivations for engaging in your products or services
* Any challenges or barriers your clients face to accessing your products or services

## Primary industry research

Research your organisation has conducted on your target market. This may include:

* Customer Feedback surveys or questionnaires
* Focus Groups
* Evaluations of program effectiveness

## Secondary industry research

Summarize any relevant publicly available industry research. This may include:

* Key demographics of your intended clients
* Size and scale of the social problem you seek to address

## Industry and Strategic Partners

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Organisation** | **Description** | **Areas of potential partnership or shared value** | **Key Contact** | **Website** |
| (Name) | (Description of the services they provide relevant to your own organisation) | (Description) | (Name) | (Link) |
| (Name) | (Description of the services they provide relevant to your own organisation) | (Description) | (Name) | (Link) |
| (Name) | (Description of the services they provide relevant to your own organisation) | (Description) | (Name) | (Link) |

## Alternative providers

It is important to understand the alternative providers your clients may access or consider. Identify alternative providers that inform your own approach to delivering your product or service.

**(Provider Name)**

|  |  |
| --- | --- |
| **WEBSITE** | (Notes) |
| **PRODUCT/ SERVICE** | (Notes) |
| **STRENGTHS** | (Notes) |
| **WHAT WE CAN LEARN** | (Notes) |

**(Provider Name)**

|  |  |
| --- | --- |
| **WEBSITE** | (Notes) |
| **PRODUCT/ SERVICE** | (Notes) |
| **STRENGTHS** | (Notes) |
| **WHAT WE CAN LEARN** | (Notes) |

**(Provider Name)**

|  |  |
| --- | --- |
| **WEBSITE** | (Notes) |
| **PRODUCT/ SERVICE** | (Notes) |
| **STRENGTHS** | (Notes) |
| **WHAT WE CAN LEARN** | (Notes) |

## Marketing strategy

Summarize your Marketing Strategy for attracting and retaining clients to your services.

# Regulatory standards and compliance

## Legislative framework

Identify the key legislative frameworks that govern your organisations operations. This includes relevant State and Federal laws or related to more than one sector of the Health and Community Services Industry.

Include the specific Act of legislation that applies to your organisation. For organisations that operate across multiple legislative jurisdictions, a summary table may be included as an Appendix.

## Industry standards

Identify the key industry standards that guide the delivery of products or services by your organisation. These may be compulsory or voluntary standards.

## Quality and Risk Management

Summarize your:

* Policies and Practices
* Approach to quality and risk management
* Resources and expertise

## Insurance

Summarize your organisation’s insurance requirements to effectively mitigate identified risks and state whether you currently meet these insurance requirements.

# Financial forecast

## Revenue modelling/ program budgets

Identify your sources of revenue and costs at the individual product or service level.

## Profit and Loss Forecast

Summarize your Profit and Loss Forecast, ideally for the next three years.

## Cashflow forecast

Summarize your Profit and Loss Forecast, ideally for the next three years.

## Assets and Liabilities

Summarize your current Assets and Liabilities as they appear on your Balance Sheet.

# Attachments

1. (Document Title)
2. (Document Title)

# Approvals

**Document author:**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Name** | **Position Title** | **Signature** | **Date** |

**Approved by:**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **Name** | **Position Title** | **Signature** | **Date** |

|  |
| --- |
| **Conditions on Approval and/or additional comments:** |

# APPENDIX 1 – (Organisation Name) Organisation Chart

Graphical user interface, application, Teams

Description automatically generated