

Club checkup checklists

Permission is granted to photocopy or customise this template.

Instructions

Complete each checklist during the workshop as instructed. Note: each checklist can be customised by your club board to suit your sport. You do not need to get a tick in every box, this does not mean you are not a good club! This may present an opportunity for you to review current practices and consider ways your club may be able to improve its present facilities and services.

Planning and Reporting Checklist

Clubs want to increase membership, raise funds, attract and retain volunteers, develop coaches and officials and maintain good financial and governance management practices. Planning is a process of mapping out how a club can successfully achieve these goals.

	Yes	If No, why not?	Detail action required to address no responses
Does your club have a detailed 3-5 year business plan?			
Is the business plan written down?			
Does the business plan articulate responsibilities to volunteers to implement the plan?			
Does the business plan articulate clear time lines?			
Does the business plan articulate clear strategies and actions?			
Does your club have a budget for implementing the plan?			
Is the business plan used to drive the agenda of the meetings of your club?			
Does every member of your club board or committee understand the budget?			
Does your board or committee review variances between actuals and budgets at every club meeting?			
Do you have operating and financial Key Performance Indicators (KPI is an operational tool used to determine success or failure of performance) for club board or committee?			
Do your board or office bearer's i.e. directors understand the KPI's?			

Budget Operating results – Surplus/Deficit Checklist

The financial health of your club is vital if you are going to meet the expectations of stakeholders i.e. members, parents, players, coaches/manager etc.

Not for profit clubs are permitted to budget for operating surplus to accumulate wealth for the benefit of its members	Yes	If No, why not?	Detail action required to address no responses
Did your club have an operating surplus last year?			
Has your club registered an operating surplus for each of the past 3 years?			
Was the operating surplus for this financial year larger than for the previous financial year?			
Does your club have clearly stated financial forecasts for KPI's?			
Are these forecasts presented at each board or committee meeting?			
Do you have an actual and target result for each area of the budget which is inline with the business plan?			
Do you have written policies on how money is received, banked and spent?			
Does your finance director i.e. treasurer hold any relevant financial qualifications?			
Do you have secure method of cash handling?			
Do you have a diversification of revenue streams?			
Are these income streams protected? i.e. by rules, agreements, contracts			
Do you have clearly stated responsibilities for each revenue stream?			
Do your committees have input into budget development?			
Do your committees have financial delegation?			
Is financial delegation in a written policy?			
Do you have clear reporting systems in place to actively monitor revenue and expenses streams?			

Marketing and Promotion Checklist

Promoting and raising the profile of your sport is a major challenge. Competition in the market place for sponsorship and media is also a significant challenge for clubs/associations.

	Yes	If No, why not?	Detail action required to address no responses
Do you have a marketing/promotions committee?			
Is there an office bearer assigned to this committee?			
Do you have a written marketing and promotions plan?			
If you have a plan, does it clearly set out strategies, actions, responsibilities and timelines?			
Do you have written sponsorship policy?			
Have you undertaken a review of sponsorship in the last 12 months?			
Do you have a written media policy?			
Have you undertaken a review of your media policy in the last 12 months?			
Do you work with local media, sending them regular articles, messages/news of events?			

Risk Management Checklist

Risk management is increasingly important for volunteers, paid staff and stakeholders of clubs/associations and is an essential component of good governance. It also provides some protection for members of boards and committees in the event of legal or financial claims or other adverse outcomes.

	Yes	If No, why not?	Detail action required to address no responses
Do you review your risks on annual basis?			
Is there a written risk management policy for your club?			
Do you review your insurance policies as part of your review of risks?			
Have you discussed and reviewed the need for the following insurance cover i.e. Public Liability, Professional Officers, Officers and Directors, sports injury, travel, building and contents?			
Do you review your insurance for special events?			
Have you completed an independent review of club assets in the past 12 months?			
Have the equipment necessary for first aid?			
Have coaches/leaders with appropriate working with children check?			
Have suitable equipment and appropriate safety practice?			
Do you have a sport safety plan which includes medical action strategies?			

Governance and Compliance Checklist

If your club is incorporated either as a company (Corporations Law) or as an association (Associations of Incorporation Act) (1984) as office bearers you are responsible as good governance to develop relevant policies, systems and procedures to comply with laws and regulations i.e. incorporation, business registration, copyright, occupational health and safety, discrimination, child protection etc.

	Yes	If No, why not?	Detail action required to address no responses
Do you understand your legal obligations as an office bearer?			
Does your club review its governance and compliances risks on annual basis?			
Does your club have a written governance policy outlining the powers of your board and committees and responsibilities of officers?			
Does your club comply with all incorporation compliance obligations on an annual basis?			
Does your club have a written member protection policy?			
Does your club comply with any WorkCover requirements (paid staff only)?			
Does your club have a written harassment free policy?			
Has your club completed an independent review of club assets in the past 12 months?			
Are all above policies and processes communicated to your members?			

Members and Communication Checklist - Key to club success is strong membership base.

	Yes	If No, why not?	Detail action required to address no responses
Does your club collect membership statistics including ages and duration of membership?			
Does your club track membership growth?			
Have your player numbers grown since last year?			
Have your player numbers grown over the past five years?			
Do you conduct membership drives?			
Do you have a growth target?			
Do you track membership retention?			
Do you have a written membership policy?			
Is this policy communicated to members?			
Do you have membership strategies and actions in your business plan?			
Is the email and internet an integral part of your communication strategy?			

Volunteers Checklist - Your club will not experience sustainable growth if you are unable to recruit and retain volunteers.

	Yes	If No, why not?	Detail action required to address no responses
Has your club conducted an audit of number, skill level and type of volunteers over the past 12 months?			
Do your clubs junior coaches have basic coaching qualifications?			
Do your clubs umpires/referees receive basic tuition?			
Do you ensure that all office bearers receive basic training in regards to their legal obligations?			
Do you have a training policy?			
Do you have education and training strategies and actions in your business plan?			
Do your volunteers understand their legal obligations and rights under NSW law?			
Do you provide all volunteers with a job description outlining their roles and responsibilities?			
Do you have a volunteer plan which outlines how you recruit, retain, manage and reward your volunteers?			
Do you inform your volunteers of insurances cover?			

Sub-committees and team work Checklist

The trend today is for clubs to have far smaller boards with greater use of sub-committees for planning purposes. Generally, sub-committees should report to the board once a year on their annual plan and periodically report to the board through the executive officer.

	Yes	If No, why not?	Detail action required to address no responses
Do you have policy/by-laws/regulations covering the recruitment process for committee members?			
Do you have policy/by-laws/regulations covering the roles and responsibilities of committees and members?			
Do you have members who readily involve themselves in committee work?			
Are your committee members drawn from a range of backgrounds?			
Do your committees work towards a common goal?			
Do you communicate to your committees the mission and vision of your club?			
Do your committee members willingly accept responsibility?			
Do your committee members ask questions and seek answers?			
Do they work cohesively?			

Sports health and community strength checklist

Distance, cost of the sport, time commitments of parents and the culture of the club are all factors which may impact on growth and sustainability of the club? Responsible clubs/associations will also promote their benefits and strength to their local community.

	Yes	If No, why not?	Detail action required to address no responses
Do you have a junior development policy?			
Do you have sufficient qualified coaches for all junior teams?			
Do you have sufficient qualified umpires/referees for all junior competitions?			
Do you have sufficient qualified umpires/referees for all other competitions?			
Do you have strategies to accumulate financial profits for member benefits and to grow your sport?			
Are these strategies communicated to members?			
Do you have activities that are suitable for juniors i.e. modified rules/equipment/age groupings/game formats?			
Do you have suitable payments options for parents and senior players?			
Do you run activities at a suitable time and location for children to access your sport?			
Do you conduct activities/events which emphasise skill development, participation and enjoyment?			
Does your club promote a welcoming environment for parents and their children?			
Does your club conduct activities/events that will suit the different interests of children?			
Have policies requiring people to refrain from drinking alcohol and smoking on the sidelines of junior games?			
Have a sunsmart policy?			
Use preventative measures and methods to limit injuries occurring?			
Have codes of behaviour for office bearers, volunteer coaches, parents, players, spectators etc?			
Have grievance handling policies and procedures in place to handle disputes between members and officials?			
In all communications promote the benefits of your sport to parents, members, players and the general community?			

Sports health and community strength checklist cont.

	Yes	If No, why not?	Detail action required to address no responses
Do you have volunteer feedback facility?			
When volunteers resign from participating club roles do you provide them with a volunteer survey seeking their feedback?			
Do you have a member's feedback facility?			
Are you actively involved in State, Zone or District Association meetings?			
Do your Board members reflect your membership?			
Do you practice gender equity in composition of your board and committees?			
Do your board members set the standard for your members?			
Do your volunteers have a club uniform?			
Do you produce a regular e-newsletter or hard copy newsletter to your members keeping them abreast of the activities of the club?			
Would you describe the relationship between your board, volunteers and members as professional, cohesive and functional?			
Does your club have an alcohol management policy?			
Do you have a "standard" by which all your members are treated?			
Would you describe your club as promoting a safe and happy environment to your local community?			