

## QUESTION: How do you manage your accounting processes?

### Expectations:

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1. Automated cashbook/accounting system.
2. Adequate for the needs of the organisation.
3. Personnel skilled in the use of the accounting system.
4. System and processes ensure accurate and reliable collection of member contributions.
5. Regular review ensures correlation between levies and member numbers.
6. Committee and volunteer/staff expertise in basic financial management.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Automated cashbook/accounting system (e.g. MYOB, Xero, and Quicken).
2. Adequate for the needs of the organisation (e.g. system able to manage purchasing, membership payments, employee payments, cash flow management, budgets, monthly reporting and annual financial reports).
3. Personnel skilled in the use of the accounting system (e.g. treasurer is a qualified accountant and/or trained in the accounting system, or perhaps contract paid accountant or accounting student to complete accounts).
4. System and processes to ensure collection of member contributions is accurate and reliable (e.g. online registrations and payment option, member database with payment information).
5. Regular review to ensure correlation between number of members and levies received (e.g. checks and balances with monthly update on membership income received and outstanding levies).
6. Committee and staff/volunteer expertise in basic financial management (e.g. one/some committee members have experience in financial job or managing a budget and finances).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Financial Management \(ClubKit\)](#)

[SPARC – Financial Management \(Running Sport\)](#)

[SPARC – Accounting Systems and Software \(ClubKit\)](#)

[SPARC – Accounting Software Quiz](#)

[Community Net – Financial management in community organisations](#)

[Inland Revenue Dept – Smart Business Guide \(includes Not for profits\)](#)

[Community Net – Financial record keeping \(accounting systems\)](#)

[www.business.govt.nz – Managing your office systems](#)

[Xero – online accounting services](#)

[Blue Avocado - Non-Profit Embezzlement: more common and more preventable than you think](#)

[Blue Avocado – Five internal controls for the very small non-profit](#)

[Blue Avocado - Tracking volunteer time to boost your bottom line](#)

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ID Number: 122 Ref: F1.1-2

## QUESTION: How do you make sure your budget is managed effectively?

### Expectations:

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1. Annual budget of revenue and expenditure is prepared in advance.
2. Minimal risk around budgeted income streams.
3. Clear accountability for budget management (organisational and individual).
4. Budget reviewed monthly (or as appropriate) by the Committee.
5. Year-to-date variance on revenue and expenditure reported and monitored.
6. Funder/sponsor funding tagged and monitored to meet financial obligations.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Operational activity is budgeted for. The organisation prepares an annual budget showing proposed expenditure and income linked to annual plans. Income is greater than expenditure unless the committee has approved use of reserves. Consideration given for provision for annual maintenance of facilities and capital replacement (e.g. replacement of playing surfaces, clubhouse etc).
2. Minimal risk around budgeted income streams (e.g. standard operating activity is not based on unconfirmed grant funding, variable income such as merchandising sales is not critical to ongoing operations etc).
3. Clear accountability for the management of organisational and individual business unit budgets (e.g. Finance Subcommittee charged with overall authority, Club Manager has delegated levels of authority for operational spending, Club Coaching Director has budget responsibility related to coaching under control of Club Manager etc).
4. Budget reviewed monthly (or as appropriate) by the Committee (e.g. performance vs budget, forecast of adjustments required to budget and/or operating activity given current state).
5. Year to date variance on revenue and expenditure reported (including adequate explanations) and monitored (e.g. Finance Subcommittee provide assessment based on reporting provided by Treasurer and explanations from Club Manager, as appropriate).
6. Funds for specific uses are identified and monitored to ensure financial obligations and accountabilities set by funders/sponsors are met (e.g. separate accounting codes for each Grant or Sponsor funding with expenditure tagged to those, ongoing reporting on amount spent/available for each Fund).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Financial Management \(ClubKit\)](#)

[SPARC – Financial Management \(Running Sport\)](#)

[SPARC – Budgets \(ClubKit\)](#)

[SPARC – Operating budget sample](#)

[SPARC – Budget example](#)

[Community Net – Financial planning \(budgets\)](#)

[Alberta not-for-profit sector – Budgeting for Not-for-Profit organisations](#)

[Blue Avocado - Tracking volunteer time to boost your bottom line](#)

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ID Number: 380 Ref: F1.2-2

## QUESTION: How do you make sure your cash flow is managed effectively?

### Expectations:

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1. Cash flow clearly linked to the annual plan.
2. Cash flow reviewed monthly by the Committee.
3. Cash flow variance reported (including adequate explanations) and monitored.
4. Action taken to address issues to maintain positive cash flow position

### Detailed Expectations for 'Sustainable' Organisations:

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1. Cash flow clearly linked to the annual plan (e.g. evidence of timing of major income sources such as membership levy payments, NSO/RSO levy due dates, key club events, grant funding payment dates etc).
2. Cash flow reviewed monthly by the Committee (e.g. reported on by Club Manager, Treasurer or Finance Subcommittee, monthly and YTD actual vs budgeted cash flow, relevant trends and comparisons). Cash flow forecast to identify if heading into cash surplus (e.g. time to invest) or cash deficit (e.g. time to borrow, cut expenditure or increase revenue)
3. Cash flow variance reported (including adequate explanations) and monitored (e.g. reporting allows planning around dips in income so good forecasting can ensure expenses are met, accountable person/committee tracks progress on cash flow issues as relevant).
4. Action taken to address issues to maintain positive cash flow position (e.g. managing access to investment income as necessary, reducing discretionary spending, cancelling or moving cash flow-dependent projects that are not possible in the current cash flow state, investing surplus etc)

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[SPARC – Sports club financial management \(ClubKit\)](#)

[SPARC – Financial Management \(Running Sport\)](#)

[SPARC – Cash flow forecasting \(ClubKit\)](#)

[Community Net – Financial planning \(cash flow forecasts\)](#)

[Community Net – Business plan template for not for profits \(cash flow forecasts\)](#)

[www.business.govt.nz – Managing business cash flow](http://www.business.govt.nz)

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ID Number: 123 Ref: F1.3-1

## QUESTION: How do you make sure your financial processes comply with legal requirements?

### Expectations:

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1. Compliance with relevant financial legislation (i.e. IRD, Incorporated Societies Act, Companies Act, Charities Act).
2. Accountability and/or 'use of funds' reports completed and accepted.
3. External certification and/or audit may be necessary in some cases.
4. Annual audit ensures sound financial processes are in place and being followed.
5. Audit trails present.
6. Annual audit issues addressed in a timely manner.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Compliance with relevant financial legislation, IRD (e.g. PAYE, Kiwisaver, Annual Tax Returns, GST), Incorporated Societies Act (e.g. rules, membership fees, registered office, submit annual financial statement, annual meetings i.e. AGM, membership list, financial records, common seal etc), Companies Act, Charities Act etc.
2. Accountability/use of funds reports completed and accepted (e.g. particularly required by funding organisations, councils etc). A mandate for members guides the use of financial reserves (e.g. constitution may dictate what level of reserves is required and limitations on usage or controls around spending of additional reserves)
3. External certification/audit may be necessary in some cases (e.g. requirement of constitution or statute, after a history of financial difficulty etc)
4. Annual audit ensures sound financial processes are in place and being followed (e.g. consider truth and fairness of financial statements, identification of financial risk areas, commercially based constructive advice on improvements in internal accounting and control systems, highlight any inaccuracy of information relied on for management decision-making, constructive observations on organisation's future plans, and compliance with statutory responsibilities).
5. Audit trails present (e.g. qualified independent auditors contact details, letter of engagement setting out terms of audit relationships, copy of audit findings letter).
6. Annual audit issues addressed in a timely manner (e.g. changes that are required following an audit are dealt with quickly, i.e. tightening up of recordkeeping processes or accountability and signing authorities etc). The committee should have a clearance meeting with external auditor to review results, audit findings letter is used as action document for necessary actions, committee track and sign-off that audit findings have been adequately addressed, committee/staff proactively consider the implications of new accounting and auditing standards)

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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### Further Reference

[NZ Institute of Chartered Accountants – Information to provide an auditor](#)

[Community Net – Basic financial management](#)

[SPARC – Financial Management \(Running Sport\)](#)

[SPARC – Financial management, Audits, Tax and GST \(ClubKit\)](#)

[Compasspoint – Internal controls checklist](#)

[Inland Revenue Dept – Charitable Organisations Forms and Guides](#)

[Incorporated Societies Online](#)

[Societies and Trusts Online](#)

[NZ Institute of Chartered Accountants – Tax and the not for profit](#)

[NZ Institute of Chartered Accountants – Not for profit sector](#)

[Community Net – Financial Management resource](#)

[www.business.govt.nz](http://www.business.govt.nz) – Business financial regulations

[Blue Avocado - Non-Profit Embezzlement: more common and more preventable than you think](#)

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ID Number: 124    Ref: F1.4-2

## QUESTION: How do you maximise the revenue gained from your current members and participants?

### Expectations:

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1. Membership levies/affiliation fees are an accurate reflection of value provided.
2. Appropriate fees are determined through consultation and comparative information.
3. Appropriate adjustment for inflation and the level of services provided.
4. Appropriate fees charged for services and value provided (i.e. not undersold).
5. Effective fee collection processes to minimise bad debts.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Membership levies/affiliation fees are an accurate reflection of the value provided (value proposition both tangible and intangibles) (e.g. the fees take into account the equipment provided, coaching and other support, facility use/hireage, administration costs, RSO/NSO levy, number of weeks of competition, social provisions etc).
2. Appropriate level for member/affiliate contributions is determined through consultation and comparative data from other organisations (e.g. information on other clubs fees across your region, or comparison to other local sports clubs that have a similar membership offering, or other private sport and recreation providers etc).
3. Appropriate adjustment for inflation and the level of services provided (e.g. fees reviewed annually taking into account changing club costs, strategic goals, membership retention from previous season and economic circumstances etc).
4. Appropriate fees charged for services and value provided (e.g. fees don't undersell what the sport is providing members). Varying levels of membership and aligned fees to meet the variation in club services (e.g. Senior, Junior Social, Supporter, Coach, Official, Administrator membership rates etc).
5. Effective subscription collection processes so maximum revenue gained without bad debts (e.g. cut-off dates, no pay no play policies, hardship provision for weekly direct debits, early payment discounts, internet banking, eftpos and credit card options, use of RSO/NSO-provided computerised membership system etc).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Organisation is 'clipping the ticket' of casual participation in the sport. This may be through new forms of membership or capturing an income stream from casual participation programmes and services. Example – Bowls NZ 'Mates in Bowls' (MIB) innovative casual member revenue stream for clubs.
4. Restructuring membership fees on a pay for service basis rather than standard membership price, to gain greater membership income while providing customers with better individual value. E.g. Mt Vic Dojo

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#### Further Reference

SPARC – Financial management (ClubKit)

SPARC – Mt Vic Dojo case

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ID Number: 65 Ref: F2.4.1-1

## QUESTION: How do you manage your existing sponsorship opportunities?

### Expectations:

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1. Responsibility of dedicated staff, committee members or contractor.
2. Sponsorship Plan to manage and develop sponsorships.
3. Fair assessment of current sponsorship properties (i.e. value and attractiveness).
4. Excellent understanding of current sponsors needs and fit.
5. Sponsorship agreements or contracts in place.
6. Good relationships established with current sponsors.
7. Measures of sponsorship performance are reviewed (e.g. sponsor satisfaction).

### Detailed Expectations for 'Sustainable' Organisations:

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1. Dedicated full or part-time staff or committee members; possibly outsourced (e.g. sponsorship, fundraising and grants coordinator, sponsorship subcommittee, person contracted on commission-only).
2. Sponsorship plan in place including management of existing sponsorships and commercial partnerships and plans to develop these by exceeding the expectations of sponsors.
3. Documented understanding and assessment of current sponsorship properties including value and attractiveness. Might be completed by external expert or with advice from RST/RSO to ensure accurate values established (e.g. put a dollar value on what you can offer a sponsor in terms of media, how many supporters would have visibility of their brand, potential sales of their product in your club, potential leadership development or corporate sports involvement for their staff, different tiers of sponsorship with aligned packages of offerings etc).
4. Excellent understanding of current sponsors including needs and fit (e.g. product sales, brand awareness through your membership, active staff involvement, size/location of signage, apparel branding, newsletter advertising, club performance updates, sponsor networking functions etc).
5. Sponsorship agreements/contracts in place (e.g. documentation of what they will provide (i.e. money/contras/people) and what your organisation will provide in return).
6. Good relationships established with current sponsors (e.g. host sponsor functions, regular contact, open information-sharing, giving not just taking).
7. Relevant performance measures in place and reviewed regularly (e.g. sponsor satisfaction, sponsor retention rates, dollar value of sponsorship year on year etc).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

6. Regular meetings to maximise mutual benefits of sponsorship, mutual alignment of organisational strategies with sponsor, and longer term commitment e.g. [Example - TRI NZ](#) and [Contact Energy](#).

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### Further Reference

[SPARC – Six steps to successful sponsorship](#)

[SPARC – Club sponsorship and funding \(ClubKit\)](#)

[Community Net – Beginners guide to sponsorship](#)

[Funding Information Service \(FIS\) website](#)

[SPARC – Sponsorship proposals \(ClubKit\)](#)

[SPARC – What is sponsorship? \(ClubKit\)](#)

[SPARC – Sponsorship agreement template](#)

**SPARC – Appointing a sponsorship fundraising and grants coordinator (ClubKit)**

**New South Wales Government – Keeping sponsors happy**

**Blue Avocado - Tracking volunteer time to boost your bottom line**

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**ID Number: 382    Ref: F2.4.2-1**



## QUESTION: How do you manage relationships with your current funders?

### Expectations:

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1. Community and Gaming Trusts Funding Plan in place.
2. Current funders and their needs are clearly understood and met.
3. Plan underway to maximise current funding and grants opportunities.
4. Proactive ongoing relationship-building with funders.
5. Longer term funding arrangements developed (where possible).
6. Organisation does not have an over reliance on funding from trusts.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Community and Gaming Trusts Funding Plan in place (documented). This should include the information identified in expectations 2 to 6. Variety of funders (e.g. Lottery Grants, NZ Community Trust, Perry Trust etc).
2. Identification of current funding sources. Assessment of trust/funder needs. Needs met or exceeded. Expenditure reported in the manner and timeframe required. Funder promoted in agreed way with adequate reporting back. Funding tied to specific events or activities with clear paper trail. Checklist when applying for funding signed off by committee.
3. Assessment of funding opportunities for the organisation. Assessment of the most effective way for the organisation to maximise grants opportunities. Activity plan to realise these funding opportunities. Documented as part of Community and Gaming Trusts Funding Plan and/or Annual Plan.
4. Proactive promotion of funders, proactive communication of related activities and other ongoing relationship building (e.g. responsible person maintains regular contact, web searching to keep aware of funder news, proactive use of funder logos and sending copies to the funder etc).
5. Longer term funding arrangements developed where possible.
6. Organisation does not have an over-reliance on funding from trusts (e.g. at risk trust funding should make up a manageable proportion of expenditure to ensure organisation could function for 6 months in the case of non-renewal of funding).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Club sponsorship and funding \(ClubKit\)](#)

[Tasman RST SportAssist Resource – Funding and Sponsorship](#)

[Community Net – Raising funds](#)

[Funding Information Service \(FIS\) website](#)

[Community Net – Fundview](#)

[Grants Online – Lottery and COGS](#)

[Blue Avocado - Tracking volunteer time to boost your bottom line](#)

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ID Number: 383 Ref: F2.4.3-1

## QUESTION: How do you manage your other key revenue streams?

- » *Other revenue streams may include fundraising activities, events, programmes, merchandise, products and services, and facilities and equipment rental.*

### Expectations:

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1. Funding Plan in place which identifies other key revenue streams.
2. Requirements to maximise key revenue streams are clearly understood and met.
3. Plan underway to maximise the opportunities within current revenue streams.
4. Ongoing relationship building with key suppliers.
5. Longer term arrangements developed where possible.
6. Organisation does not have an over-reliance on funding from any one revenue stream.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Funding Plan in place to identify key revenue streams (e.g. fundraising, special event entry fees, club merchandise sales, equipment on selling).
2. Requirements to maximise key revenue streams are clearly understood and met (e.g. quality/volumes of merchandise or equipment for sales, beneficial partnerships to reduce facility downtime).
3. Action plan underway to maximise the opportunities within current revenue streams (e.g. plan for maximising facility usage and downtime through agreements/relationships with schools and community groups, clear focus on fundraising activities chosen to get maximum income using available resources).
4. Ongoing relationship building with key suppliers (e.g. merchandise wholesalers, equipment suppliers, facility managers).
5. Longer term arrangements developed where possible (e.g. broadcast rights, merchandise supply agreements).
6. Organisation does not have an over reliance on funding from any one revenue stream. At risk funding (e.g. merchandising, clubroom rental) should make up a manageable proportion of expenditure to ensure organisation could function for 6 months in the case of funding dips (e.g. drop in merchandise sales, similar facility available locally becomes more popular).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Fundraising ideas for clubs](#)

[Community Net – The seriously good guide to fundraising](#)

[Waitakere City Council – Fundraising](#)

[Office for the Community and Voluntary Sector - Diversifying income sources and managing costs](#)

[Sport Business – Maximising the value of venues](#)

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ID Number: 466 Ref: F2.4.4-1

## QUESTION: How effectively have you performed against measures of financial sustainability?

### Expectations:

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1. Adequate reserves in place (minimum six months operating).
2. Expenditure needs realistically budgeted for.
3. Result trends indicate budgets are consistently met (or performance within budget).
4. Demonstrated diversity of revenue streams with no over-reliance on specific revenue.
5. Evidence of growth in membership/ participation revenue.
6. Positive results around sponsorship revenue/satisfaction.
7. Positive results around funder revenue/satisfaction.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Adequate reserves in place (minimum six months operating).
2. Expenditure needs realistically budgeted for (e.g. use last year's expenditure as a basis and make allowance for economic impacts such as petrol prices etc).
3. Results trends indicate budgets are consistently met (or performance within budget).
4. Demonstrated diversity of revenue streams with no over-reliance on specific revenue.
5. Evidence of growth in membership/ participation revenue.
6. Positive results around sponsorship revenue/satisfaction. Positive indicators around sponsorship indicate current and future sponsors' needs are being met. (e.g. retention of sponsors, growth in numbers of sponsors increased value of sponsorship monies/contra and/or positive sponsor satisfaction results)
7. Positive results around funder revenue/satisfaction. Positive indicators around funding to indicate gaming trust/funders' needs are being met (e.g. retention of funders, growth in numbers of funders, increased value of funding received and/or positive funder satisfaction results)

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

4. Gaming Trust funding has been reduced and is no greater than 50% of total operating revenue.

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#### Further Reference

[Community Net – Financial reserves policy](#)

[Community Net – Sustainable funding or self resourcing](#)

[SPARC – How Mt Vic Dojo gained financial sustainability](#)

[Blue Avocado - Tracking volunteer time to boost your bottom line](#)

[SPARC – Online survey tools](#)

[Online Survey Tools e.g. TechSoup NZ, Survey Monkey, GoFetch](#)

[CEO Online – Using KPIs as an organisational scorecard](#)

[Community Driven Institute – Creating and measuring real outcomes](#)

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ID Number: 643 Ref: F2.5-2

## QUESTION: How do you manage your current membership effectively?

- » *Member management is how you manage the administration of your membership, including registrations, database management and communications with members.*

### Expectations:

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1. Appropriate member management expertise internally or contracted out.
2. Effectively using your current membership systems and processes.
3. Accurate and functional database of participants and volunteers/staff.
4. Capture all potentially useful information on members.
5. Comply with Privacy Act and Anti-Spam legislation when collecting, maintaining and using data.
6. Strategy and policies developed in consultation with members.

### Detailed Expectations for 'Sustainable' Organisations:

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1. There is appropriate member management expertise – qualifications, experience – internally or through use of external contractors or outsourcing to online provider etc.
2. Effectively using your current membership systems and processes (e.g. club has effective subscription collection and recording systems to ensure full subs collection).
3. An accurate and functional database of clubs, customers (e.g. segmented by participants, high performance athletes, coaches, officials and administrators) and volunteers/staff (indicating those actively delivering services for your organisation and their employment status). This should be reviewed and updated annually.
4. Capture all potentially useful information on members (e.g. what type of member they are, years as a member, level of involvement, date of birth for rep nominations, occupation or parents occupation for potential sponsors/volunteers, contact details including email, mobile, Skype address, twitter profile etc).
5. Privacy Act and Unsolicited Electronic Messages Act legislation complied with when collecting, maintaining and using data (e.g. authorised data collection and use, subscription based emails and unsubscribe processes etc).
6. Strategy and policies developed in consultation with members (e.g. feedback from members on ease of registration process, committee and staff/volunteer feedback on gaps in data collection etc).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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#### Further Reference

[SPARC – Database basics](#)

[SPARC – Membership databases \(ClubKit\)](#)

[SPARC – Privacy requirements \(ClubKit\)](#)

[Privacy Organisation – How to comply with the Privacy Act](#)

[Keeping it Legal – Basic overview of Privacy Act](#)

[Anti-spam Organisation – Anti-spam legislation](#)

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ID Number: 391 Ref: F4.1-1

## QUESTION: How effectively have you performed against measures of member management?

### Expectations:

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1. Results confirm accuracy and currency of membership database.
2. Uptake and growth of membership indicate needs are being met.
3. Positive results for member satisfaction (e.g. on registration, confidentiality, communication).
4. Evidence of success in measures of managing member communication, feedback and complaints.

### Detailed Expectations for 'Sustainable' Organisations:

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1. Results confirm accuracy and currency of member database (e.g. low number of address incorrect returns, current year data available on key contact information, including qualifications and experience and competition level/type, year of initial membership, birth-date etc)
2. Uptake and growth of membership indicates needs are being met.
3. Positive results on satisfaction of members e.g. measured via member surveys or evaluation forms to understand level of satisfaction with leadership, communication and club interaction with members).
4. Evidence of success in measures of managing member communication, feedback and complaints (e.g. membership subscription collection vs registrations, reading click-thrus of e-newsletters, response rates to online competitions/surveys, increase in subscribers for e-news/forums etc).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Online self-management of contact details linked to registration to ensure accurate and up to date customer information.
4. Automated online subscription collection allowing member payment and registration details to be captured once and allocated/shared as required to club/RSO/NSO.

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### Further Reference

[SPARC – Membership databases \(ClubKit\)](#)

[SPARC – Database assessment quiz](#)

[SPARC – Database basics](#)

[SPARC – Privacy requirements \(ClubKit\)](#)

[Keeping it Legal – Basic overview of Privacy Act](#)

[Privacy Organisation – How to comply with the Privacy Act](#)

[Anti-spam Organisation – Anti-spam legislation](#)

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ID Number: 629 Ref: F4.2-2

## QUESTION: How do you make sure your club has effective ICT capability?

» *ICT = Information and Communications Technology.*

### Expectations:

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1. ICT systems and processes effectively support organisational activity.
2. Appropriate ICT expertise internally or through external consultants.
3. Suitable ICT hardware and software is in place.
4. ICT equipment is functional to meet club needs
5. Evidence of internet access (i.e. broadband or dialup plan and usage).
6. Lease or ownership arrangements (as appropriate).

### Detailed Expectations for 'Sustainable' Organisations:

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1. ICT systems and processes effectively support current organisational activity (e.g. reporting, communication, database management, sport-specific technology). Processes around software/hardware purchasing, maintenance/upgrades, internet/email use, security/backup, use of ASPs/freeware, communication standards i.e. Skype).
2. There is appropriate ICT expertise – qualifications, experience – internally or through use of external consultants including outsourcing (e.g. a member who works in ICT, a sponsor who will provide advice/support from their IT department etc).
3. Suitable ICT equipment is in place including cell phones, desk phones, desktop computers, laptop computers, PDAs, servers, networking equipment (switches/routers etc), printers, operating systems and versions (e.g. Windows 2000 SP4 or Windows XP SP1, Windows Vista, Mac etc.). Suitable software access (e.g. software for word processing, spreadsheets, database, accounting, publishing, presentations, internet security, communications etc).
4. ICT equipment is functional to meet club needs (e.g. administrators able to complete required tasks, broadband to maximise online productivity, computers work when they're needed etc (as relevant)).
5. Internet access – broadband or dialup (include plan and usage if possible).
6. Lease or ownership arrangements as appropriate (e.g. leased hardware, or cloud computing (e.g. use of SAAS (software as a service) or ASP (application service providers) as relevant).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

3. No major pain points due to inadequate technology (e.g. incompatible systems).
4. No major issues with downtime from lack of functionality or support.
5. No major pain points due to inadequate technology (e.g. broadband vs. dialup).

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### Further Reference

[SPARC – Information Communications Technology](#)

[Community Net – Choosing the right software](#)

[Community Net – Choosing the right hardware](#)

[Examples of Web-based support available e.g. Xero online accounting software, iSportz online database and information-sharing portal, Sports Clubs NZ Directory, Sportsground websites](#)

[Community Net – IT How to Guide](#)

[Community Net – Planning and budgeting for IT equipment](#)

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ID Number: 469 Ref: F4.1-1

## QUESTION: How do you manage your organisational knowledge effectively?

- » *Managing organisational knowledge allows more informed decision-making, avoids duplication of resources and loss of knowledge and opportunities when staff/volunteers leave, and increases access to the organisations recorded internal knowledge.*

### Expectations:

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1. Process to manage the collection of volunteer/staff knowledge.
2. Process for transferring and sharing knowledge and information throughout the organisation.
3. Strong information-sharing between club, RSO and NSO.
4. Involved in networking opportunities for information sharing.
5. Processes to keep organisational knowledge accurate, reliable, timely, secure and confidential.
6. Processes to measure, gather and use all relevant information for reviewing performance and planning.

### Detailed Expectations for 'Sustainable' Organisations:

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1. You have a process to manage the collection and transfer of staff and volunteer knowledge. Methods might include regularly reviewing and updating standard operating procedures (SOPs), policies, training, staff meetings, shared-access computer or physical files, attendance at sport sector training etc.
2. You have a process to manage organisational knowledge for quickly identifying, sharing and implementing best practices. Websites with template downloads and online forums for sharing best practice that are actively used by stakeholders, customers, partners as relevant. Process for passing information up and down the sporting structure. You have a process to manage the collection and transfer of knowledge from and to NSO/RSOs/clubs/members/stakeholders/suppliers/partners and collaborators. Methods for this might include newsletter, email, meetings, virtual meetings, reports, electronic file transfer, text messaging, and 0800 number.
3. Strong two-way communications between sporting structure partners with examples of where operating best practices are shared and implemented among other partners in the sporting structure (e.g. using registration templates created by a local club, adapting a volunteer management guide from a club in another part of NZ).
4. Involvement in sport sector led networking opportunities for information sharing across codes, code led opportunities for intra-code sharing (e.g. RSO club forums, RST administrator/coach/officials meetings, NSO administrator forums).
5. Organisational knowledge is kept accurate, reliable, timely, secure and confidential through the use of technology (i.e. databases, CRM tools, virus protection, firewalls etc) or through standard processes (i.e. set dates for policy updates, accountabilities for website management and update regularity, office security for physical records etc).
6. Processes exist to measure and/or gather relevant information about all key aspects of the organisation and actively use that information when assessing how you're performing operationally and strategically and what changes needs to be made (e.g. financial reporting systems, survey collection and sharing, checklist of information and data required for club planning session and/or for monthly committee meetings).

### Examples of Good Practice

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*Examples provided by facilitators when they score an organisation 'High Performing' or 'World Class'. Examples are noted against the relevant Expectation number.*

1. Example

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**Further Reference**

SPARC shares case studies on Excellence Award Winners

SPARC – Sharing Good Practice

Examples of Web-based support available e.g. Xero online accounting software, iSportz online database and information-sharing portal, Sports Clubs NZ Directory, Sportsground websites

Online communication e.g. Skype, Google Gmail, Microsoft Wiki, Twitter, Facebook, MySpace etc.

Community Net – Human sustainability

Community Net – Keeping information safe and private

Community Net – Organising your records

Community Net – Organising your filing system

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