

# CLUB GUIDE





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SECTION 03

CLUB EXECUTIVE

## 3.1 PLANNING

Planning is integral to the successful operation of all clubs. Types of planning include:

- Business Planning
- Strategic Planning
- Succession Planning
- Financial Planning (see Finance section)

With any plans the following should be identified:

- Goals - statements that explain the broad directions
- Objectives – states more specifically a series of achievements that contribute to achieving the goal. Make sure they are specific, measurable, achievable, and realistic and have a timeframe.
- Actions – what needs to be done to achieve these objectives?
- Responsibilities – who is responsible for completing the actions?
- Timeframes – when do actions need to be completed?
- Resources – what financial and human resources are required?

When the plan is completed remember to:

- Share the plan with members and ensure that they understand it
- Make any alterations needed
- Promote your plan to sponsors and stakeholders, the more you promote it the more people will know about it and willing to assist with it
- Use your plan, refer to it on a regular basis, evaluate it and modify it if necessary
- Identify any completed tasks or objectives or goals reached and celebrate them

### Strategic Planning

Strategic planning is the process of defining its strategy or direction, and making decisions on allocating its resources to pursue this strategy, including its capital and people. This process is vital to the viability of all clubs, as a means of further growth.

#### *Benefits of Strategic Planning*

- To identify the club's past, present and future direction
- Establish objectives
- Encourage member contribution to future club development
- Evaluate the club
- Implement changes in response to factors impacting upon the club
- Ensure the potential of resources are realised, i.e. human, physical and financial
- Create order to club operation

### The Strategic planning process

#### *Engage*

To plan effectively, it is important to involve as many people as possible. If club members are allowed input in its design, it is likely to be comprehensive and more easily implemented. Ideally, this will create a sense of ownership by members, resulting in greater support and enthusiasm to make improvements when needed.

Committee members, office bearers, members, coaches, officials, parents, sponsors and key stake holders should be involved in the planning process.

#### *Development*

The planning process may coincide with other events on the club calendar, such as the Annual General Meeting (AGM), club conferences or workshops, or a specially convened meeting.



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Allow ample time for the 'brainstorming' of ideas and development of the framework. The amount of time allocated will vary depending on the size of the club.

Distribution of the Strategic Plan framework will offer the plan to be reviewed prior to its adoption by the club. At this time, amendments may be made prior to implementation.

### *Evaluate*

An important aspect of planning is its evaluation, as a means of monitoring progress and implementing amendments identified. This evaluation process should be a permanent feature on the club calendar, occurring at a minimum, once a year.

### **Business Planning**

A business plan is a formal statement of a clubs' goals, stating the plans for reaching those goals and the reasons why they are believed to be attainable. It may also contain background information about the team or committee attempting to reach those goals. Simply, it may be the strategy utilised to attain the Clubs' objectives.

A business plan prepared for the club committee and members will need to include evidence of potential income generation. The business plan should clearly identify all the important facts about the club, such as its history, its current financial position, its objectives and the 'business' activities to be undertaken.

### Benefits of Business Planning

- To ensure Clubs remain financially stable over a specified period of time
- To raise funds toward a capital investment, eg. a facility
- To prevent financial distress by over-spending, eg. day-to-day running of club, or when hosting a Special Event

### **The Business Planning Process**

#### *Engage*

To Plan effectively, it is important to involve as many people as possible. Engage club members, Committee members, office bearers, coaches, officials and other interested parties in the planning process.

Evaluate whether it is necessary to appoint one person as the facilitator of the process to ensure it is completed. If specific issues impede the progression of the planning process, the facilitator can be responsible for re-visiting it at an appropriate forum. Alternatively the facilitator may suggest that the individual or group take some time between the planning sessions to think about the issue/s and bring possible solutions and/or strategies to the next session.

#### *Development*

The planning process may coincide with other events on the club calendar, such as the Annual General Meeting (AGM), club conferences or workshops, or a specially convened meeting.

It is important to research the current market in which your club operates – who your club appeals to, who its competitors are, and what factors may influence the clubs future, are important issues to be considered.

Develop an agenda for what items (business planning sections) you will cover on specific dates, detailing any items members should bring to the meetings, i.e. reports, documents, ideas etc.

Set some dates for members/committee to come together to go through the business planning process. If the club does not have an existing business plan, additional time will be required to complete this process.

Allow ample time for the 'brainstorming' of ideas and development of the framework. The amount of time allocated will vary depending on the size of the club.



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Distribution of the Business Plan framework will offer the plan to be reviewed prior to its adoption by the club. At this time, amendments may be made prior to implementation.

### *Evaluate*

An important aspect of planning is its evaluation, as a means of monitoring progress and implementing amendments identified. This evaluation process should be a permanent feature on the club calendar, occurring at a minimum, once a year.

For further assistance with planning processes please contact the SLSWA Corporate Services Department.

### **Succession Planning**

Succession planning is the process of identifying and preparing suitable people through mentoring, training and position rotation, to replace key players within the Club as they chose to resign their position or their term expires.

Most importantly succession plans are used to ensure your club will continue to operate if a person/s resign their position in the club, and that the outcomes of their work continues well beyond their involvement with the club.

A succession plan is necessary to provide opportunities for potential leaders within clubs to be identified and developed in readiness to move into leadership positions. Clubs that plan for smooth transitions of leadership are less likely to experience disruptions to their operations and are in a better position to replace volunteers who vacate their current positions.

### *Reasons for a succession plan:*

- So the same people don't feel obliged to help
- To encourage more people to attend meetings and workshops
- To engage more people in external meetings and workshops
- To ensure your club will function efficiently if a key person or people left suddenly
- To allow temporary filling of positions, in the case of illness or absence
- To support and therefore better assist the club

### *Components of a Succession Plan*

- A strategic/business plan – is a working document outlining the club's priorities, and should be consulted regularly throughout the year. It does not have to be a long document
- Position Descriptions – useful when recruiting new office bearers, and ensuring that you know what jobs the vacating volunteer was responsible for
- Policies and Procedures manual – outlining the day-to-day tasks of your club, and who is responsible for completing them
- Reporting procedures – demonstrating the method of reporting to the committee
- Education and development opportunities – increasing role performance, job satisfaction, and assisting personal growth. These opportunities should be available to others in the club, so that if necessary, someone else is able to step into the vacant position
- Mentoring of youth and interested members – by encouraging youth and interested members to assist officer bearers with their roles

### *Points for Consideration*

- How many people manage and understand the existing systems within a club?
- Does your club lack formal reporting procedures?
- Are volunteers managed appropriately? I.e. what screening, recruitment, orientation, training, recognition, replacement systems are in place
- Are youth permitted administrative responsibility if they have demonstrated an interest?
- What can the club do when long serving members are no longer meeting their role responsibilities?
- Is the club and its members open to change?



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For effective Succession Planning, it is important that Office bearing members who are leaving their position, to share as much knowledge as possible to the person replacing them. As a result of this process, new members may learn from past experiences and successes and how to avoid potential problems.

Such an approach emphasises the importance of keeping accurate and current records of relevant information for roles. The handover process can be better managed by including the training and recruitment of potential committee members within the overall strategic plan.

### Reference

- Australian Sports Commission Club and Association Planning [www.ausport.gov.au](http://www.ausport.gov.au)



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SECTION 02

CLUB MANAGEMENT

## 3.2 WORKING WITH KEY STAKEHOLDERS

A major Committee responsibility is managing the relationships between key stakeholders and other external relations. Positive relationships between these groups are imperative for public relations and future resource allocation and community development. It is in your Club's best interests to be seen as reliable and expert sources of advice on policy and funding matters.

### Strategy

It is advised that the management committee approach key stakeholders to:

- Develop and maintain contacts in media and government
- Document and distribute information to key decision makers
- Position and align the organisation with similar organisations
- Develop a good working knowledge of media and government

### Recognising Potential

The potential lobbying and public relations opportunities within a Club are often overlooked. By recognising these opportunities, the Club may take advantage of the skills, knowledge base and resources available within Club membership. Examples may include: members who are employees or owners of small businesses or government agencies, financial skills they possess, etc.

It is not necessary to aim all lobbying at high profile stakeholders. Community views, opinions and activities filter up to the decision-makers. Examples of when this may occur include:

- Club involvement in community events and activities
- Social and official functions
- Other community group involvement
- Personal and professional contacts

### Relationship with your local Council

Establishing a good reputation with your Council is imperative and will benefit your Club enormously in the long term. Here are some tips to consider:

1. Get to know the Council through councillors, senior officers and recreation and maintenance staff
2. Invite them to club functions, be hospitable and ask them to present trophies and show appreciation for services they provide
3. Understand the problems the Council is having and help them with issues that affect your Club
4. Offer the Clubs assistance with any community projects where possible
5. Praise the Council wherever possible, particularly in the media and any other public arena
6. Approach problems constructively and seek 'win-win' solutions
7. Encourage ethnic groups to take an interest by inviting them to participate in club activities
8. Insist on good behaviour from members whilst taking part in club activities or using the facilities
9. Be on good relations with the neighbours, premises, businesses close to the beach (complaints to the Council may tarnish your Club's image)
10. Establish a positive public relations program by appointing a member to carry out defined tasks, such as liaison with the Council



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### 3.3 CLUB RECORDS

An efficient and effectively run Club will have a well organised information management system. Information such as membership nominations, membership transfers, correspondence, minutes, reports and circulars are some of the information sources that will need to be received, recorded, distributed and stored.

Clubs should find the receipt, record, distribution and storage of information easier with the use of computers. Some information will still be received in hard copy and office bearers may not have access to computer facilities. As such, the following systems will need to be utilised.

#### *Receiving*

It is important that the office bearer responsible for receiving correspondence reads all incoming mail to the Club so that a record can be kept for files where necessary. Minutes of meetings, circulars, etc should be copied to the relevant parties on receipt.

#### *Filing*

A filing system such as lever arch folder is useful for filing correspondence, reports and minutes. Depending on the quantity of information received, your Club may find it necessary to have a folder for each department, such as financial, media and promotions, etc, or by patrol season. Office bearers may also wish to scan all information to the office computer, and save in the appropriate folder. Remember to back up to an external hard drive as a precaution.

#### *Information Distribution*

The office bearer assigned to collecting and distributing information will be responsible for ensuring the relevant people receive a copy or the original correspondence. Information may best be distributed be best sent via email attachment to the relevant office bearer, who will take the appropriate action

Note: It is the Club's responsibility to ensure that Circulars are disseminated to the relevant people within the Club.

#### *Storage*

A Club should keep files such as membership details, financial records and so on, for a minimum of seven years. Wherever possible, it is recommended that they are kept for longer and the ideal way is to save information electronically.

#### **SurfGuard**

SurfGuard is the online system used by Clubs, Branches, States and Surf Life Saving Australia to record membership, awards, patrols, rescues, gear and equipment register, transfers and organisation details. It is also used to generate a wide range of reports to increase efficiency and allow the evaluation of statistics.

#### *SurfGuard Access*

In order to obtain access to SurfGuard, a User Registration form must be completed and forwarded to SLSWA. A username and password will then be provided to the applicant. The SurfGuard User Registration form can be found on the SLSA website, alternatively a copy can be sourced from SLSWA.

Clubs should review who has access to SurfGuard on an annual basis in line with elections and position changes. Accounts expire after 3 months of inactivity. SurfGuard is accessed from [www.surfguard.slsa.asn.au](http://www.surfguard.slsa.asn.au)

#### *SurfGuard Assistance*

SurfGuard assistance and support is available from the SLSA IT Helpdesk which can be contacted by phone on 1300 724 006 or via email [surfguardhelp@slsa.asn.au](mailto:surfguardhelp@slsa.asn.au).

#### *SurfGuard Upgrades and Changes*

SurfGuard is an evolving resource that continues to be enhanced. Important alerts and changes are listed on the front page of the website (SurfGuard Entry Point) under Messages. They are also communicated through SurfGuard Enhancement Advisories which are circulated in Club Mail and also available via the SLSA Member Portal.



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The following information is recorded in SurfGuard:

- Club address and contact details
- Club Officers, Positions and Committees
- Club Positions
- Club Committees
- Member details (as per the membership form)
- Award information (requests to conduct and also member awards)
- Proficiency records
- Incident reports
- Patrol logs
- Patrol hours and statistics
- Gear and equipment
- Patrol exemption requests
- Total member patrol hours
- Custom reports to meet their needs

### *Reporting*

A wide range of reports can be produced in SurfGuard to increase administration efficiency and produce statistical reports.

Under the Summary Section, Clubs can view a snapshot of:

- Assessment requests
- Award totals
- Membership statistics
- Leading patrol members
- Transfers

Under the Mailing Groups Section, Clubs can automatically set up mailing groups for:

- Boards
- Committees
- Members
- Or any group they design

Under the Reports Section, Clubs can print off custom reports for:

- Club Contacts
- Competition age category
- Current awards
- Email lists
- Gear and equipment
- Mailing labels
- Member transaction Reports
- Membership details
- Membership renewal form
- Officers
- Patrol attendance
- Patrol deficit
- Patrol type hours
- Patrolled or unpatrolled Statistics
- Total member patrol hours
- Custom reports to meet their needs

### **References**

- SurfGuard [www.surfguard.slsa.asn.au](http://www.surfguard.slsa.asn.au)
- SurfGuard Users Guide found in the 'Information Technology – Guides' section of: <http://sls.com.au/downloads>
- SLSA IT Systems User Account Application Form F049 found in the 'Information Technology – Forms' section of: <http://sls.com.au/downloads>





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## 3.4 MEETINGS

Essential components of a general meeting are meeting procedure, written agenda and notes of minutes and presentation of financial statements. Ideally, roles within a meeting should be identified to progress matters with ease.

Notice of meetings should be outlined in the Club's Constitution and Regulations. This notice should be adhered to and any items submitted after closing date postponed until a later time.

There are two main types of meetings:

- General meetings are usually well publicised with a written agenda. Minutes are taken during the meeting and the information is circulated at a later date to relevant parties, while a copy is kept for records.
- Annual General Meetings (AGM) are held in the offseason and as the name suggests, once per year and Special or Extraordinary General Meetings may be held to deal with specific issues, such as a vital matter arising that requires urgent discussion by the whole group. These meetings may be held as and when needed and are open to all members. These meetings are an opportunity for members to review the previous season and initiate proceedings or changes for the coming season. Clubs may vary the timing allocated for the meeting, persons eligible to vote, the election of officers and changes to the constitution, at these meetings. These specifics should be outlined in the Club Constitution. At the AGM, the Annual Report is presented for adoption. All members should be given a copy of the Report in advance, with enough time to review it before the meeting.

### Board of Directors or Management Meetings

The Board of Directors or Management Meetings are places where both groups make decisions, involving elected or appointed decision makers. Both groups usually meet monthly.

The Board of Directors may review or prepare Management Committee agendas to ensure all matters coming before the Committee are relevant and appropriate. The Management or Board may also interpret policies to staff, oversee implementation of new policies or refer questions to other Committees or the full Management or Board of Directors.

Reports should be made at each Management or Executive Committee meeting concerning the activities of the group.

### Sub-Committee Meetings

Sub-Committees are designed to focus on a specific issue or task, such as finance, fundraising, marketing and so on. Regular reports by the Sub-Committee should be made to the Management/Executive Committee concerning progress and other activities. Regular reporting is also an important tool in keeping people advised of activities within other Committees. The recommendations and information reported by the Sub-Committees form the basis from which the Management Committee make decisions. That is, Sub-Committees do not have the power to make decisions, simply make recommendations to management.

### Meeting Procedures

Structure is necessary within a meeting, as it improves the efficiency of business conducted. In addition, the rights of members present are protected, enabling everyone to have equal right to vote, make decisions, to be heard and have their viewpoint considered.

Simply by advising participants, meetings can be assisted by:

- Planning meetings at regular intervals so people can plan their attendance ahead of time
- Ensuring the group understands that the task and final decision are the joint responsibility of the group
- Welcome ideas from all members, treating them with respect
- Advise members how they are expected to contribute and why they are present
- Share responsibility
- Create a friendly atmosphere within the meeting



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### Setting the agenda

Agendas allow meetings to run more efficiently as well as assist the recording of minutes. The way in which your Club's agenda is decided will vary depending on the size of your Club.

For example, more formal organisations may circulate the issues to be discussed, as identified by the Secretary and Chairperson, ahead of the meeting to allow time for members to prepare their thoughts and arguments in advance. If members have issues to add to the agenda in this situation, they should notify the Secretary.

Disadvantages of this approach in forming the agenda include people not being confident putting items on the agenda, as well as a small number of people dominating the agenda.

Smaller Clubs may take a different approach, the members being requested to place items on the agenda at the beginning of the meeting. In this way, items that are suggested at the beginning of the meeting will be discussed in turn.

Although this approach may encourage greater participation, some people may find it difficult preparing their argument on the spot.

An alternative suggestion may be a sheet posted on the Club notice board – an 'Agenda Sheet' – calling for items to be discussed at the next meeting.

The most important issues should generally be discussed at the beginning of the meeting.

### Quorum

A quorum is the minimum number of people necessary to make a valid decision and is usually outlined in the Constitution. A meeting can be declared invalid if a quorum is not present or insufficient or incorrect notice of the meeting is given.

### Motion

A motion is a formal recommendation put before a meeting for debate and consideration. They provide more structure for the meeting and generally increase formality. Motions should generally:

- Begin with 'that'
- Be specific and unambiguous
- Not be worded in the first person
- Not contain more than one sentence
- Not attempt to revive a motion previously rejected
- Be submitted in writing

An amendment is the process of altering or changing a motion, Constitution or Regulation. Amendments should:

- Commence with 'that'
- Be specific and unambiguous
- Be relevant to the motion
- Be within the scope of the notice convening the meeting
- Not contradict the motion
- Not attempt to revive an amendment previously rejected
- Be submitted in writing

### Reaching a decision

The obvious purpose of a meeting is to reach a decision on matters or issues that are set on the agenda.

The most common methods of reaching a decision are voting and consensus decision-making.



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Voting generally assumes that the views of the majority should prevail. A simple vote occurs when general agreement is sought among the participants. Verbal voting, by proclaiming 'yay' or 'nay' or voting by a show of hands are common ways of reaching a decision in a simple vote.

Although these types of voting have the advantage of being quick and allowing everyone to participate, some people may feel ignored, may not be committed to the decision or solutions may be missed.

However, some issues require a more formal method of decision making, such as individual and secret voting. Voting by proxy and postal voting may be required for more complex issues, to ensure all relevant people are included in the decision making process.

Consensus this approach assumes that decisions can be agreed or consented to by all members, with some form of cooperation between all. In a consensus vote, one or two people should be elected to direct the discussion, ensure no one is blocked from the debate, state the issue clearly and facilitate discussion. The chairperson makes suggestions but does not force a decision, asking at the conclusion whether everyone agrees on the issue stated.

If agreement isn't reached, those who disagreed are asked to offer alternatives. If only one or two people are blocking consensus, they should be asked whether they are willing to stand aside to allow the group to go ahead in the action proposed. If the individuals decide to stand aside, they should not be expected to carry out any action associated with the decision, with their disagreement should also be recorded.

Terms that you should be familiar with:

- Reaching consensus – the group is willing to go ahead with the decision
- Objection – when a person is unwilling to stand aside to let the group proceed
- Reservation – when a person has a concern but will stand aside
- Friendly amendment – when a person agrees with the proposal but wants words, sentences or other points changed.

Roles within a meeting

The Chairperson is responsible for directing business and conducting the meeting, allowing the chairperson relative power and authority. The chairperson and Director of Administration should meet to discuss agenda items prior to the meeting and ensure that they are circulated before the meeting.

Characteristics of an effective chairperson:

- Unbiased and impartial
- Familiar with the standing orders of the organisation and relaxed and tolerant when applying them
- Good listener and able to keep the meeting on track, ensuring it starts and finishes on time
- Refers items to a working group for a report at the next meeting if a decision is unlikely to be made at the present point in time

Roles of the Chairperson:

- Ability to delegate tasks to other members
- Prepare the agenda in conjunction with the Director of Administration
- Identifies who wishes to speak and indicates when they may
- Decides when discussions should be brought to an end
- Does not usually get involved in discussions unless their opinion is specifically sought and should summarise the issue being discussed so that a decision may be made

The Director of Administration holds a variety of tasks that take place before, during and after the meeting. They are usually the first point of contact for members to raise issues and coordinate links between key people.



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Characteristics of an effective Director of Administration:

- Good communicator and a clear thinker
- Able to manage and supervise others whilst maintaining confidentiality
- Able to organise and delegate tasks
- Be familiar with the Constitution and abide by its policy

Roles of the Director of Administration:

- Prepare the agenda in conjunction with the Chairperson
- Organise meeting time and place, admission to the venue and use of its services
- Advise those concerned with enough notice of the meeting, its venue and other particulars
- Enclose the minutes of the previous meeting if they have not already been posted
- Take minutes from the meeting

At the Annual General Meeting, additional duties may be included, such as:

- Collecting and collating reports from office bearers
- Advising members of the meeting within a specified time (as stated within the Constitution)
- Call for and receive nominations for Committees and other positions
- Arrange for the printing of the Annual Report
- Arrange guest speakers

### **Streamline Meetings**

If your committee meetings run overtime, are dominated by a few people and resolve little – then take action. Meetings should be a key vehicle for running the club, but all too often they waste time and achieve little. The ‘must-do’ items for effective meetings:

- A planned calendar of meetings
- Meetings run in an orderly manner, with contributions from all
- The Chair controls the meeting and fully understands his/her legal and procedural requirements
- An agenda is circulated, highlighting items for resolution and important information
- Board papers are precise, easy to understand and distributed on time
- Utilise Sub-Committees – not everything has to come to the committee meeting

### **Taking Minutes**

The Director of Administration should do the following when taking minutes of the meeting:

- Follow the order of the agenda
- State the main issues, points of view put forward and decisions made
- Ensure the full text of motions is recorded
- Be alert to take extra notes that may be needed by the chairperson
- Record attendance and apologies
- List accounts for payments approved, reports received, main points of answers required for Correspondence

Between meetings, the Director of Administration should:

- Write up the minutes as soon as possible following the meeting
- Circulate the minutes to all members as soon as possible (preferably within a week of the meeting)
- Using the minutes, note the points of action that need to be followed up in the coming weeks. A method of monitoring these tasks may be by having an ‘action by’ column down the side of the page
- Ensure all important arrangements are confirmed in writing with copies made and filed. Records of important telephone conversations are also recommended



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### Template of Action Sheet

Annual General Meeting

List of Members Attending, i.e.

Joe Smith (President)

Ann Martin (Director of Administration)

Serial	Meeting	Action Required/Action Taken	Responsibility	Status
1	15/2/09	Plans to be finalised Lodge plans at Council	President	
2	15/2/09	Update Surfguard with all data	Director of Administration	50% complete

### Meeting Reports

Written reports should be encouraged by Committee and Sub-Committee members on a regular basis. The reports may be in the form of progress reports or project reports and often reduce the amount of time spent talking about the issue in the meeting.

The report should be succinct, focusing on the details of 'what, where, when, how and why'.

The conclusion of the report should contain a recommendation or set of recommendations for a decision. The content of a report should be acknowledged as being received, noting the outcomes of recommendations.

### Conflict in Meetings

Conflict is a natural often inevitable aspect of meetings. Conflict in these situations is often perceived as negative, when in fact it suggests that members are actively taking part in discussion and are passionate about their involvement in the decision they are making.

Positive outcomes of conflict in meetings include the discussion of alternative viewpoints and the airing of hidden problems. These factors facilitate innovation and increase motivation and performance.

Alternatively, negative outcomes of conflict include communication breakdowns, attention being diverted from goals, a shift to authoritarian leadership styles and narrow group perspectives.

Conflict may be managed by negotiating and bargaining, mediation and arbitration, in addition to direct intervention by the chairperson. The speaker may interrupt with the objection that it is 'only fair everyone gets to state their case' or '-', you are preventing others from hearing the case' or the speaker may appeal to the chair 'if you and the meeting wish me to continue, I will do so if I can explain my case in full', and so on.

### Reference

- Australian Sports Commission [www.ausport.gov.au](http://www.ausport.gov.au)



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## 3.5 ANNUAL REPORT

All incorporated clubs affiliated with Surf Life Saving Western Australia must complete an Annual Report; SLSWA recommends the inclusion of an audited financial statement. For affiliation this needs to be submitted to SLSWA by prior to SLSWA AGM in accordance with the circulated affiliation requirements.

### Roles

The Annual Report should be collated with the assistance of office bearers, the Club President and Director of Administration.

### Compilation

It is advisable that information that will contribute to the Annual Report is collected throughout the year and stored in a folder for easy reference at the time of writing.

Annual Reports are an excellent tool to showcase your Club's achievement to members, the community, sponsors and government bodies.

A copy of each Annual Report should be kept with the minutes, such as in the Minute book. It is suggested that every ten years or so the Annual Reports are bound into a volume to form a valuable part of Club history.

### Essential Components

The annual report can be as simple or complex as the club is capable of producing, however, there are a number of minimum content requirements. These guidelines provide a checklist for the person responsible for producing the club's annual report.

- Title Cover/table of contents – must include date of season
- Club Objective
- Information on Patrons, Vice Patrons and Life Members
- List of Club office bearers for the season, including meeting attendance statistics
- Sponsorship List
- President's Report
- Club Financial Statements including Income and Expenditure, Balance Sheet and, if required, signed Auditors Report
- Office Bearers' Reports, including where applicable:
- Club Captains Report
- Patrol/Life Saving Services Report
- Chief Instructors Report
- Junior Activities Report
- Cadets Report
- Under 18 Report
- Competition Report – listing team members by name, eg. boat crews, board teams etc and include club, state and national championship results
- Marketing/Social Activities Report – including all club sponsors (although this may seem to be a repeat of basic information, by including a description of sponsorship activities it reinforces the club's appreciation of their sponsors)
- Membership Statistics
- Patrol Statistics
- Lifesaving awards gained by club members
- Special club milestones/events
- Recognition of members' outstanding achievements (these may include community awards gained outside club activities)
- Bereavements



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### **Distribution**

A copy of the Clubs Annual Report, full Auditors Report and Financial statements for the past year must be sent to SLSWA prior to the SLSWA AGM in accordance with the circulated affiliation requirements.

### **The Annual Summary Returns**

The Annual Summary Returns consists of statistics relating to: Rescues, Preventative Actions, Emergency Care, Gear and Equipment, Membership, and Lifesaving Awards.

The Annual Summary Returns are calculated between the two to four weeks after the patrol season. All clubs should ensure their data is up to date on SurfGuard prior to the commencement of this process .

### **Reference**

- SurfGuard [www.SurfGuard.slsa.asn.au](http://www.SurfGuard.slsa.asn.au)