

Annual Timeline Template

Item	What	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Documentation													
Game Plan Preparation	TAI distribute Game Plan Workbook for next financial year												
	Commence discussion on Game Plan preparation												
	Trust complete Game Plan												
Shop Lease	Check expiry and include in Game Plan												
Shop Budget	Receive draft budget from TAI												
	Discuss draft budget												
	Finalised and signed off budget returned to TAI												
	Receive finalised budget from TAI												
Annual Accounts	Receive annual accounts from TAI												
	Return signed accounts to TAI												
Health and safety													
Annual Health and Safety review	Conduct annual Health and Safety review												
	6 month Shop safety audit/hazard check												
Reporting													
Annual Plan Review	Review, monitor and report on your activities												
Volunteer hours survey	Complete and return to TAI												
Charities Services and Education	Annual tally of education activities												
Korero	Send contributions to TAI												
Manager Appraisal	Review with Trust HR representative												
	Review with Trust HR representative; report to NRM												
	Review with Trust HR representative												
	Annual appraisal and creation of annual plan for new financial year. Report to Trust and NRM												

Item	What	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Conference/Regional Meetings													
Conference/Regional Meetings	Event held												
Shop Trust AGM	Set date												
	Hold meeting												
Trustee appointments/ resignations													
	Advise Charities Services & TAI												
	Advise Charities Services throughout year within 3 months of any Trust appointments / resignations												
Christmas Function	Plan and set date												
	Hold event												