

The Game Plan Workbook

Name of Trust: _____

Annual Planning document
1 July 2023 - 30 June 2024

Section One:

Our Current Situation

**Identifying where
we are at**

The current situation of our Shop Trust

{Brief summary of the current position of the Trust}

Shop

{What is the current situation of the Shop?}

Trustees

{A brief outline of your Trustees}

Staffing and Volunteers

{A brief outline of your staffing and volunteer situation}

Financial

{What is your current financial position?}

	Actual for previous financial year 2021/22	Budget for this financial year 2022/23
Gross Sales		
Net Sales		
Wages		
Expenses		
Gross Margins		
Profit		
Percentage return to Movement (on net sales)		

Shop Manager Plan

Your Shop Manager will have developed an annual plan (attach it to this document).

Discuss this with them and ensure there is alignment between this and the Game Plan.

Shop Lease

{Brief summary of the lease details}

The Trust currently holds a lease for its retail premises with: _____

Date lease signed: _____ Period of lease: _____

The term of the lease is: _____

The next review date is: _____

Final expiry date of the lease is: _____

Action required by the Trust in the coming financial year regarding the lease is:

Strengths, Weaknesses, Opportunities and Risks

{Identify at least one of each. Ensure the focus relates to Trust responsibilities, not the Shop}

Strengths	The Trust will maximise them by:
Weaknesses	The Trust will minimise them by:
Opportunities	The Trust will maximise them by:
Risks	The Trust will minimise them by:

Section Two:

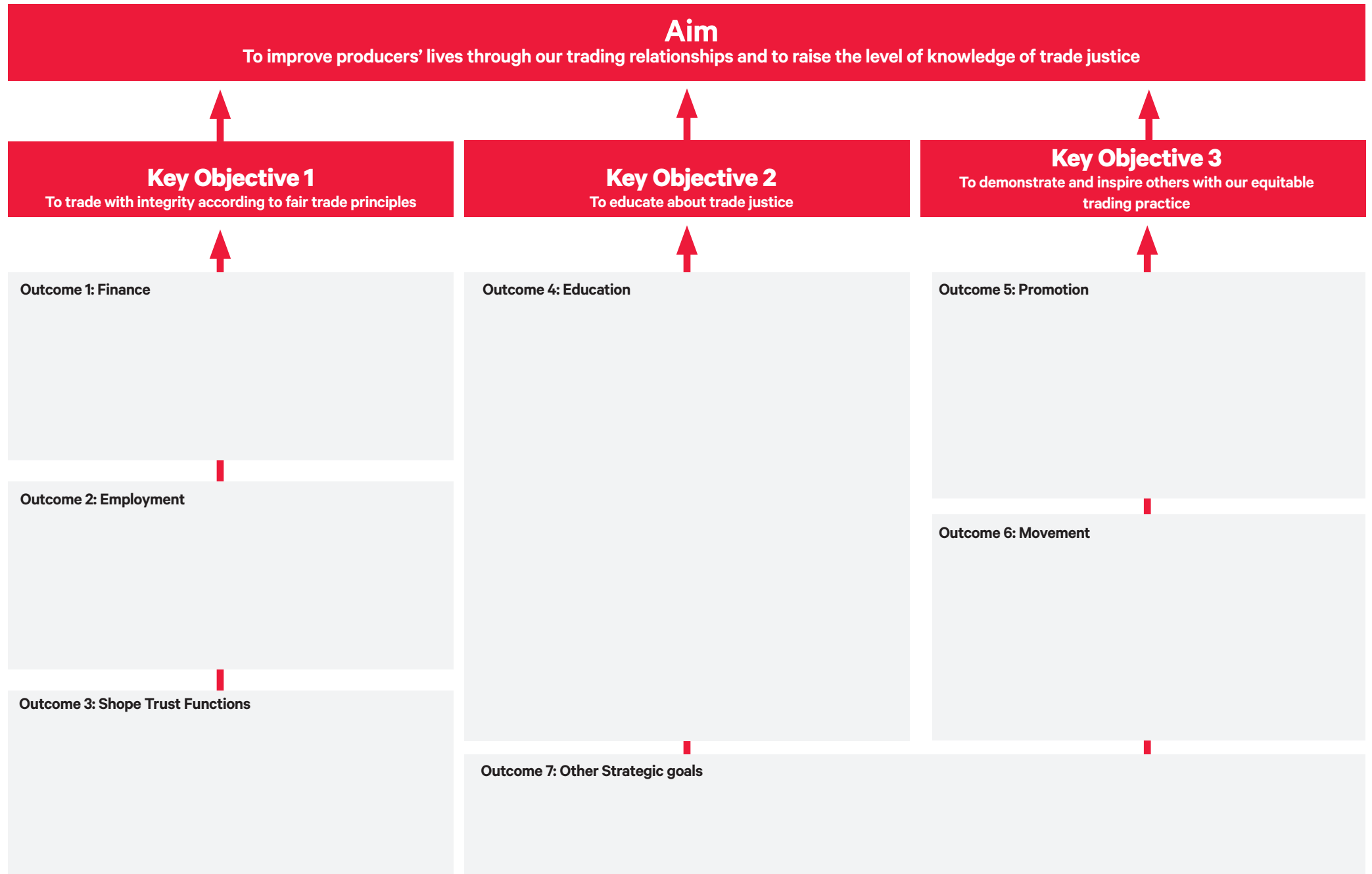
Our Game Plan

**The plan for the
year ahead**

Our Game Plan Flowchart



See p.8 of the guide for further detail on what each of the 6 outcomes outlined below consist of.



Activities and reporting for Objective 1

- To trade with integrity according to fair trade principles

Activities for Outcome 1 - Finance:

In the space above please put your identified outcome from p.7.

Activities for outcome 1	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
1.1			
1.2			
1.3			

Mid year review January	End year review July	Outcome

Activities for Outcome 2 - Employment:

In the space above please put your identified outcome from p.7.

Activities for outcome 2	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
2.1 Manager appraisal	July: Quarterly appraisal - Effort October: Quarterly appraisal - Effort; Half-yearly appraisal - Developmental Performance January: Quarterly appraisal - Effort April: Quarterly appraisal - Effort; Half-yearly appraisal - Developmental Performance	Trust HR representative Trust HR representative with 6 month report to National Retail Manager Trust HR representative Reporting to Trust and National Retail Manager	July October January April
2.2			
2.3			

Monitoring and reporting for Outcome 2 - Employment:

Mid year review January	End year review July	Outcome

Activities for Outcome 3 - Shop Trust Function: _____

In the space above please put your identified outcome from p.7.

Activities for outcome 3	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
3.1			
3.2			
3.3			

Monitoring and reporting for Outcome 3 - Shop Trust Functions:

Mid year review January	End year review July	Outcome

Activities and reporting for Objective 2

- To educate about trade justice

Activities for Outcome 4 - Education:

In the space above please put your identified outcome from p.7.

Activities for outcome 4	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
4.1 Kete 1 and 2: staff and volunteers complete workbooks			

Monitoring and reporting for Outcome 4 - Education:

Mid year review January	End year review July	Outcome

Activities and reporting for Objective 3

- To demonstrate and inspire others with our equitable trading practice



(page 10 Guide)

Activities for Outcome 5 - Promotion: _____

In the space above please put your identified outcome from p.7.

Activities for outcome 5	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
5.1			
5.2			
5.3			

Monitoring and reporting for Outcome 5 - Promotion:

Mid year review January	End year review July	Outcome

Activities for Outcome 6 - Movement: _____

In the space above please put your identified outcome from p.7.

Activities for outcome 6	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
6.1			
6.2			
6.3			

Monitoring and reporting for Outcome 6 - Movement: Outline internal and external plans to promote the Movement, etc.

Mid year review January	End year review July	Outcome

Additional Activities Outline relating to Key Objectives 1, 2 & 3

Activities for Outcome 7 - Other Strategic Goals: _____

In the space above please put your identified outcome from p.7.

Activities for outcome 7	How this will be achieved (Measurable)	By whom	When will we do it (Timeframe)
7.1			
7.2			
7.3			

Monitoring and reporting for Outcome 7 - Other Strategic goals:

Mid year review January	End year review July	Outcome

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												

Hand made change

At Trade Aid we're all about change.

We're helping talented people
around the world to improve their
lives through trade.

