



Organisational Overview TEMPLATE

An Empowering Process

Every successful team ensures all members are able to all be & act in concert together in their offering & the organisational purpose. This **Organisational Overview Template** will support you to create the unity and alignment necessary for healthy & effective **Collaboration, Creativity & Connection** within your team.

Template — Fill out with team members

Best way to proceed is by utilising all current organisational documents if any are available, so as not to repeat any work that has already been accomplished. Bring the the team together for 90 minutes to brainstorm in order to best capture the main points per section. Choose a member to create an initial draft, and circulate for comments. As a Living Document — updated ongoingly — ensure a first draft is adopted within the first 2 weeks of initiation — reminding each other that it is better to have a document available to work from than nothing at all. As we encourage: *Good enough for now, safe enough to try!*

1. WHY WE EXIST

- A) Vision: What We Hold Dear
- B) Mission: What is 'Ours to Do'
- C) Objectives: Goals We Have Set
- D) Context, Beliefs and Assumptions
- E) Impact: Change We Want to See

2. WHAT GUIDES US AND MAKES US DISTINCTIVE

- A) Values
- B) Distinctive Approach
- C) Our Venue
- D) Our History

3. OUR COMMUNITY, FRIENDS AND ENABLERS

- A) Our Business
- B) Audience — The Folks We're Here For
- C) Partners, Allies and Funders

4. HOW WE ARE ORGANISED

- A) Where You'll Find Us
- B) Who We Are: Board of Trustees & Management Staff
- C) Governance: Structure and Decision-Making
- D) How the Money Works

