



Check-up: Our money story

Effective financial management involves many different components that form your overall 'money story'. Use this check-up to evaluate whether understand your money story and are governing your finances effectively.

Tick the box that most reflects your level of agreement or disagreement with each. If any statements are a problem for your group, you might also like to indicate its priority (low, medium, high).

Our group have a plan and budget in place, and we stick to this plan.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree

We regularly review how we are tracking against our budget.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree

Our policies and procedures clearly outline roles, responsibilities and expectations in relation to our group's finances.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree

We have policies and procedures that help clarify the balance between regulatory requirements and cultural expectations.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree

We have processes in place to plan and forecast for the future.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree

We are able to ask the tough financial questions when needed.



Strongly agree



Agree



Unsure



Disagree



Strongly disagree