**Template Instruction**

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| This resource will support Committee Members in undertaking a self-assessment of their financial literacy.This may aid in the identification and planning of Committee Member training and/or help the Treasurer to present financial reports with an appropriate level of supporting detail. Ideally, this resource should be completed and reviewed as required |

**1.** Click on top left corner to enter the name of your Club or Organisation

**2.** Click on ‘**CENTRE**’ of picture at right. A “Pop Up” will appear that will allow you to insert your club/organisation LOGO via two ways. Select from either your own computer files or the Internet.

**3.** **Click On** other text fields and an instruction will appear.

**4.** Click on square fields in columns to mark your rating

**5.** This is a “Checklist” to confirm where your financial knowledge is sitting. Use it as a guide.

**NOTE:** If desired background colours may be applied. Click on document page, under Design menu bar select page colour. A page boarder may also be added to enhance document presentation and/or for adding club colours to standardise your documents.

 

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<https://www.npsr.qld.gov.au/legal/disclaimer.html>

Recommended Resource Links

National Parks, Sport and Racing offer a range of free on-line or “Face to Face” training sessions to enhance your volunteer experience

Face to Face Workshops - <https://www.qld.gov.au/recreation/sports/volunteers-coaches/workshops>

Online Courses & Library - <https://www.npsr.qld.gov.au/industry-information/clubs/resources/>

 To access – HOLD CTRL key and click on link

**TO DELETE COVER PAGE “TEMPLATE INSTRUCTION”**

1. Click on insert tab at the top.

2. Click ‘Cover Page’ at the left

3. Click “REMOVE CURRENT COVER”

 Click or tap here to enter text.

 

**Self-Assessment for Committee Members Financial Literacy**

This self-assessment helps the board identify any training that board members may require to assist them carry out their financial duties.

Use this tool to help you as a committee member determine your own strengths and weaknesses in this area. Tick the rating that best describes your knowledge and duties. Remember to redo this self-assessment after the completion of your training to evaluate your knowledge base and learning.

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| --- | --- |
| Volunteer Name | Date |
| Click or tap here to enter text. | Click or tap to enter a date. |
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| --- | --- | --- | --- | --- |
| My knowledge | Poor | Fair | Good | Excellent |
| My knowledge of my financial responsibilities and liabilities as a board member is |[ ] [ ] [ ] [ ]
| My knowledge of the different forms of financial reports is |[ ] [ ] [ ] [ ]
| My knowledge of the assumptions that underlie my organisation’s annual budget is |[ ] [ ] [ ] [ ]
| My knowledge of the financial specifics of the organisation’s business plan is |[ ] [ ] [ ] [ ]
| My knowledge of the fundamental trends underlying the organisation’s income and expenditure is |[ ] [ ] [ ] [ ]
| **My duties** | **Never** | **Rarely** | **Sometimes** | **Often** |
| I adhere to my financial responsibilities to the best of my abilities |[ ] [ ] [ ] [ ]
| I look for ways to update my knowledge of my financial responsibilities |[ ] [ ] [ ] [ ]
| I avoid micromanaging financial matters that fall under the sphere of action of the manager |[ ] [ ] [ ] [ ]
| I decline to take on any other financial responsibilities that conflict with my responsibilities to the organisation |[ ] [ ] [ ] [ ]
| **My commitment** | **Never** | **Rarely** | **Sometimes** | **Often** |
| I happily use my networks and contacts to help raise funds for my organisation |[ ] [ ] [ ] [ ]
| I have offered to serve on budget sub-committees or assist the treasurer with the preparation of financial papers |[ ] [ ] [ ] [ ]
| **My meeting performance** | **Never** | **Rarely** | **Sometimes** | **Often** |
| I read the accounts circulated by the treasurer before the meeting, and check the calculations |[ ] [ ] [ ] [ ]
| I give the treasurer notice of any matters I propose to raise in the meeting |[ ] [ ] [ ] [ ]
| I seek answers to any questions relating to my organisation’s financial position |[ ] [ ] [ ] [ ]
| I ask for clarification where I do not understand the situation |[ ] [ ] [ ] [ ]
| I continue to seek clarification until I am satisfied with the answers I am given |[ ] [ ] [ ] [x]
| I avoid taking up meeting time with long discussions of small sums |[ ] [ ] [ ] [ ]
| I review the format of the treasurer’s report to ensure that all necessary information is included |[ ] [ ] [ ] [ ]

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For knowledge where you have ticked poor or fair, it is recommended that training and development of your knowledge of financial literacy is undertaken. This course is a great start.

<https://www.qld.gov.au/recreation/sports/volunteers-coaches/workshops/topics#financial-management>