



## Do you have the following in place for your organization?

Date: \_\_\_/\_\_\_/\_\_\_

Name of Organization: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Mobile and Work numbers: \_\_\_\_\_

Email Address: \_\_\_\_\_

Fax Number: \_\_\_\_\_

First Contact Date: \_\_\_\_\_

Next expected Contact Date: \_\_\_\_\_

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What have you achieved since our last visit?

### QUESTIONS TO HELP US HELP YOU

What do you need help with today?



## **RULE BOOK**

**Do you have a constitution (Rule Book) in place?**

**When was your rule book last changed?**

**Does the rule book need updating?**

## **Members and Directors**

**Do you have a list of the Members and their addresses and phone numbers when they first joined and when they ceased to be a member?**

**Has it been updated and checked recently?**

**Have these been (sent) registered (to) with ORIC?**

**Do you have a current list of directors and their addresses and phone numbers?**

**Have these been registered with ORIC?**

**Has this been updated recently?**

**Do your directors understand their role and responsibilities?**



## Meetings

Would like help with meetings?.... and do you know how to prepare an agenda?

How often do you have committee meetings?

When was your last committee meeting?

Did you have an AGM this year?

When was your last AGM meeting?

Have you been doing your returns to ORIC?

Are true and accurate minutes of meetings being kept and filed?

Do you hold an AGM each year before the 30<sup>th</sup> November?

When was your last AGM return completed?



## Organizational Checklist

### Financials

Are your financials up to date and have they been returned to ORIC?

Does your organization know their current money/financial position?

Do the Directors check on staff who handle the money to make sure they are managing it correctly?

Does the organization have an accredited accountant and auditor who checks the financial position ?

Do you pay your taxes on time these include GST, Pay as you go PAYE, Fringe Benefits Tax, superannuation guarantee for staff?

Are all the Directors present when a funding body comes to visit?

### Asset Register

Do you have an assets register?

Is this register up to date?

Are the current assets you own being used as per the funding agreement?

Is anyone misusing or given away assets which do not belong to them?



## Insurances

Does the organization have in place insurances including property/ building and contents, professional indemnity insurance, public liability insurance and director's insurance?

## Staffing

Do you understand "FAIRWORK" and what this means when hiring staff?

Would you like help with employing staff?

Do you understand staff rights and responsibilities?

## Funding

Are you currently accessing any government funds?

What are these funds used for?

Do you understand your reporting requirements in relation to these funds? Do you need help with this?



## Miscellaneous

What would you like to learn more about so that can help you achieve your goals?

Do you have a good understanding of the law and what it means and what constitutes fraud?

Other issues not mentioned above: