

GATHERING PLACE “FINANCIAL HEALTH” SESSION (Morenga Hunt, Facilitator)

Questions to address (for each table, or other grouping together, based on similarities)

Good Financial Health = Financial Stability + Financial Sustainability

Financial Health ASSESSMENT:

What criteria or measures do you currently use to assess your financial health?

- Based on your own criteria or measures, how would you rate your institution's or organization's financial health? (1-5: 1=crisis; 2=fair; 3=ok; 4=good; 5=excellent)

What other criteria or measures can you use to assess your financial health?

(Refer to shared resources)

- Based on these criteria or measures, how would you rate your organization's or institution's financial health? (1-5: 1=crisis; 2=fair; 3=ok; 4=good; 5=excellent)
- Did your assessment change, or remain the same? Why? In what ways?

Financial Health PLANNING:

- Do you currently plan for good financial health? (Stability + Sustainability)
If so, how? What is your planning process? (Who's involved, what do you look at, and how often? --Annually, quarterly, monthly--more or less often?)
- What are some benefits/challenges/issues of Financial Health planning?

Financial Health ACTIONS: -- Putting your Plan into Action

- What do you do now to improve your organization's financial health?
- What can you do--actual steps you should/can take--to implement a plan?
(What/Who/When/How/How much—time, money, skills required)
- How would you get started?
 - What can be done with what/who you have?
 - What actions can you take to get started?
 - What should/will you do within the next 3 months, 6 months, beyond?

Financial Health EVALUATING:

- Do you evaluate the progress of your financial plans (annual & longer-term)? How?
- Do you have a process to adjust your plans, if or as needed?