

**Small Organisation’s Health Check**

A health check for your organisation is like an MOT for your car. It enables you to look at all the different elements within your organisation and to check that they are working properly and running smoothly. And like an MOT an **annual** health check makes sure your organisation is firing on all cylinders.

Carrying out a health check will enable your trustees to identify how your organisation really works; what is working well and what areas may need further support so that the organisation can function more effectively.

Changing legislation, policies, procedures and guidance can result in the need to update documentation and practices. Through regular monitoring and evaluating you can ensure your organisation is in good health.

The health check is not something you pass or fail. Your development worker will help you go through your health check and help you decide what action you may need to take.

The health checks are split into different areas, so if you would like to focus   
on one area then you can select that area and answer those questions. When you have finished your health check, VODA will discuss how they can best support your group’s development.

For support in completing the health check please contact VODA’s Core Services Team:

* Telephone: 0191 643 2636
* Email: development@voda.org.uk

Tick all of the statements that apply to your group. Your development worker will help you decide which areas are most important for you to work on first.

**Organisation Name:**

**Date:**

**Red Amber Green System (RAG)**

Using the RAG system enables you to assess your level of understanding, knowledge and skills and helps you identify additional support and learning requirements.

Red – Action or additional support recommended

Amber – some actions or additional learning recommended

Green – No immediate action required, continued monitoring recommended

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| **We know who we are and what we want to achieve** | **MC900432601[1]** |
| I’m really confident all of our group members know what our group is about, we seem to have a clear direction. | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a constitution which outlines our aims, and we have a mission statement. | |  |  |  | | --- | --- | --- | |  |  |  | |
| We refer to our constitution and mission statement regularly. Everyone has a copy, understands its content and why we need it. | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with identifying our aims. | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Planning** | **MC900432601[1]** |
| We have a plan for the activities we want to carry out over the next 6 -12 months and know who is doing what and when. | |  |  |  | | --- | --- | --- | |  |  |  | |
| We are aware of social and economic factors that may affect our planning e.g. new legislation and policies, changing politics, Brexit etc. | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a three year plan and review our performance regularly | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a simple business plan or a development strategy | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with our forward planning | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Money Management** | **MC900432601[1]** |
| We have proper book keeping systems in place and some internal controls (for example two signatures on all cheques and transfers) | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a treasurer who provides regular updates on the financial situation of the organisation | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a clear understanding of all the costs involved in running our group and prepare annual budgets in advance of each financial year | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a funding strategy in place | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with our financial management and/or book keeping | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Getting Funding** | **MC900432601[1]** |
| We rely on member’s subs and other self-generated funds to keep us ticking over | |  |  |  | | --- | --- | --- | |  |  |  | |
| We are aware there are other ways of getting money and funding for our group and how to explore them and whether they’d be right or not for the group | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a plan for self-generating to cover our core costs income from a wide range of sources | |  |  |  | | --- | --- | --- | |  |  |  | |
| We can identify funders for any new activities/services we may wish to provide | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have accessed VODA’s free funding advice service | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with increasing our resources | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Becoming sustainable (making sure we have a future)** | **MC900432601[1]** |
| We have managed to keep going okay for the last few years, so don’t feel we need to change | |  |  |  | | --- | --- | --- | |  |  |  | |
| We are not worried about what change might mean for our group so feel reluctant to look at new opportunities for us to grow | |  |  |  | | --- | --- | --- | |  |  |  | |
| We know that it’s a good idea to collect information about what we do to prove we are effective and to think about ways we can improve | |  |  |  | | --- | --- | --- | |  |  |  | |
| We monitor our work, collecting information and feedback about what people like about our services and use this information in our planning to improve our delivery | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with sustainability | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **What goes on around us** | **MC900432601[1]** |
| We know how to find out about what’s going on locally or nationally that may affect our organisation or the people who use it | |  |  |  | | --- | --- | --- | |  |  |  | |
| We receive newsletters and information about the changes in policy relevant to community and voluntary group e.g. VODA, VONNE | |  |  |  | | --- | --- | --- | |  |  |  | |
| We try to keep up to date with what goes on in our local area and with changes to the law that might affect us | |  |  |  | | --- | --- | --- | |  |  |  | |
| We know who our local Councillors are have their support and what services the Council and its officers can provide | |  |  |  | | --- | --- | --- | |  |  |  | |
| We are aware of other groups and organisations in our area, what they do | |  |  |  | | --- | --- | --- | |  |  |  | |
| We network with other groups and organisations | |  |  |  | | --- | --- | --- | |  |  |  | |
| We signpost or refer people to other groups and organisations and work complimentarily rather than in competition | |  |  |  | | --- | --- | --- | |  |  |  | |
| We’d like some support with finding out what goes on | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Communications** | **MC900432601[1]** |
| We know how people find out about our organisation. E.g. word of mouth, newsletters, website | |  |  |  | | --- | --- | --- | |  |  |  | |
| The people who need to know about us already do, so we don’t need to publicise or promote ourselves | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have leaflets and posters about our organisation which we give out | |  |  |  | | --- | --- | --- | |  |  |  | |
| We regularly update our marketing materials | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have a communications and marketing strategy and regularly look for ways to let people know about who we are and what we do | |  |  |  | | --- | --- | --- | |  |  |  | |
| We need help to improve raising awareness of what we do | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Digital Communications** |  |
| We have a website with lots of information about who we are and our activities and how people access them and update it regularly | |  |  |  | | --- | --- | --- | |  |  |  | |
| We use social media, such as Facebook, Twitter and Instagram, to promote our organisation and attract new members | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have good expertise within our group to utilise digital systems well | |  |  |  | | --- | --- | --- | |  |  |  | |
| We would like some support to improve our digital communications | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Committee, Trustees and Volunteers** | **MC900432601[1]** |
| We have an elected committee responsible managing the organisation | |  |  |  | | --- | --- | --- | |  |  |  | |
| There are clear role descriptions for committee members and everyone knows what is expected of them | |  |  |  | | --- | --- | --- | |  |  |  | |
| Our committee has received training on their roles and responsibilities | |  |  |  | | --- | --- | --- | |  |  |  | |
| We would like to recruit more volunteers and management committee members to join our organisation | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have role descriptions for volunteers and recruit people with the right skills to carry these out | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have the policies and procedures in place to support our volunteers | |  |  |  | | --- | --- | --- | |  |  |  | |
| We would like some support with our volunteers or management committee | |  |  |  | | --- | --- | --- | |  |  |  | |

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| **Safeguarding Children & Young People or Vulnerable Adults/Keeping People Safe from Harm** | **MC900432601[1]** |
| We’re really sure of our responsibilities around safeguarding | |  |  |  | | --- | --- | --- | |  |  |  | |
| We have policies on safeguarding vulnerable adults and/or children, that are reviewed at least annually, which everyone is familiar with | |  |  |  | | --- | --- | --- | |  |  |  | |
| Everyone is clear about who to report to and appropriate timescales if we have concerns about safeguarding issues | |  |  |  | | --- | --- | --- | |  |  |  | |
| The relevant people have undertaken safeguarding training | |  |  |  | | --- | --- | --- | |  |  |  | |
| We would like some support around safeguarding | |  |  |  | | --- | --- | --- | |  |  |  | |

**Policies, procedures and insurances**

It is important to have the correct policies, procedures and insurances in place to support your volunteers and members. Tick to show which your organisation has, which you think it should have, and any you are unsure about

|  | **Yes** | **No** | **Don’t know** |
| --- | --- | --- | --- |
| Constitution or other governing document |  |  |  |
| Membership list/ Contact details |  |  |  |
| General Data Protection Regulation (GDPR)  Compliance |  |  |  |
| Data protection and confidentiality policy |  |  |  |
| Cheque signing, income and expenditure system  Financial procedures document |  |  |  |
| Health and safety policy |  |  |  |
| Risk assessments, carried out within the last year |  |  |  |
| Public Liability Insurance |  |  |  |
| Other Insurances (e.g. property theft, loss of money, transporting money from a fundraising event) |  |  |  |
| Child protection policy |  |  |  |
| Protection of vulnerable adults policy |  |  |  |
| Good practice guidelines for child/vulnerable adult protection |  |  |  |
| Process for Disclosure and Barring Service checks |  |  |  |
| Equal opportunities policy |  |  |  |
| Volunteers policy |  |  |  |
| Procedures for working with volunteers under 18 years |  |  |  |

**The main things we feel our organisation needs help with are:**

**(Please add additional boxes if necessary)**

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**Group Development Action Plan**

You can use the Group Development Action Plan to address any issues which have been raised as part of the health check process. You should agree as a group who will work on each of the Action Points and what is a reasonable timescale. The Action Points should not be left to one person to complete and your Development Worker can support you to achieve your aims.

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| **Action Point** | **Who** | **When** |
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**Date completed:**