

Organisational Health Check

This quick self-assessment has been developed to give you a general idea of the state of your organisation in terms of overall good practice. Going through these questions will help you identify the strengths and weaknesses of your organisation, and to draw up an action or development plan. Further support is offered by DeVA partners to help you with any of the items on this check list.

1. Stating our purpose	No	Nearly	Yes
1.1 We have a mission statement			
1.2 Our (current) aims (still) comply with our constitution			
1.3 We ensure that all the people working in our organisation understand its purpose at an appropriate level (staff and volunteers)			
Notes:			

2. Information on services and promotion of work	No	Nearly	Yes
2.1 We have an up-to-date leaflet or written information on our services			
2.2 We have a website or webpage with up-to-date information			
2.3 We make information available to users with special needs, on request			
2.4 We produce an annual report			
2.5 We keep our stakeholders (e.g. funders and potential funders, key organisations and groups) informed about our work such as sending them our annual report or invite to AGM			
2.6 We make use of the media to promote our work (press releases, radio etc.)			
Notes:			

3. Administration and paperwork	No	Nearly	Yes
3.1 We have a clear administrative system in place			
3.2 All our procedures are documented (so that staff and volunteers know what to do in case of absences or sudden staff changes)			
Notes:			

4. Finances	No	Nearly	Yes
4.1 We have written financial procedures (for banking, petty cash, cheques etc.)			
4.2 We produce quarterly reports (at least) on accounts			
4.3 Accounts and financial reports are presented to our Management Committee for review and planning (at least quarterly)			
4.4 We have a fundraising strategy which seeks funding from a variety of sources			
4.5 We know what level of reserves we need and what we can spend them on			
4.6 We have this amount set aside			
Notes:			

5. Internal Communication	No	Nearly	Yes
5.1 We hold regular staff meetings (as appropriate)			
5.2 Volunteers are invited to or represented at staff meetings			
5.3 The minutes of staff or management meetings are available to all staff and volunteers			
5.4 We communicate project updates internally on a regular basis			
5.5 We hold an annual 'away-day' for teambuilding and/or planning for trustees, staff and volunteers			
Notes:			

6. Governance or Management Committee	No	Nearly	Yes
6.1 We have a competent management committee and actively seek out people with appropriate skills			
6.2 We offer training and information to trustees on their roles and responsibilities, on legal issues and changes in legislation			
6.3 We have an induction procedure for new Committee members			
6.4 We invite our trustees to teambuilding, planning and social events			
Notes:			

7. Compliance	No	Nearly	Yes
7.1 We ensure that we comply with the regulatory requirements of our legal structure and submit accounts (where required) and other required material in a timely manner			
7.2 We comply with statutory regulation and have clear			

policies in place (including Health and Safety and Data Protection)			
7.3 We are complying with other required regulation applicable to our organisation (e.g. safeguarding)			
Notes:			

8. Equal Opportunities	No	Nearly	Yes
8.1 We have an Equal Opportunities policy that applies to all areas of our work			
8.2 We comply with the Equality Act (2011) legislation, including for recruitment of staff and volunteers and the provision of services			
8.3 We monitor Equal Opportunities and use this information to develop our services			
8.4 We include Equal Opportunities in our induction and offer training on equal opportunities to all staff, volunteers and trustees on a regular basis			
Notes:			

9. Staffing	No	Nearly	Yes
9.1 All staff have an up-to-date contract of employment, job description and terms and conditions			
9.2 We comply with employment and equal opportunities legislation and inform staff of relevant changes			
9.3 All staff receive regular reviews, support and supervision			
9.4 All staff are offered training and development activities			
9.5 There is a personal file with records of review and supervision sessions and other information tracking personal development			
Notes:			

10. Volunteers	No	Nearly	Yes
10.1 We have a volunteer induction pack and procedure with information on our organisation and its policy			
10.2 We offer to reimburse our volunteers expenses			
10.3 Volunteers are covered by our insurance			
10.4 Volunteers receive a clear task description and their situation is reviewed informally or formally through regular support and supervision			
10.5 We offer training and development opportunities to all our volunteers			
10.6 We invite volunteers to social events			

10.7 We hold exit interviews with volunteers			
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11. Training and Development	No	Nearly	Yes
11.1 We identify the training needs of staff and volunteers through regular reviews or supervision			
11.2 We have an adequate budget for training and development			
11.3 We have an IT policy with a code of practice, which includes the use of internet, email and social media			
11.4 We evaluate training for the benefit of the trainee, the team and the organisation			
11.5 We have a written training policy linking training expenditure to our development or business plan			
Notes:			

12. Monitoring and Evaluation	No	Nearly	Yes
12.1 Our services or projects have clearly defined outputs, including those agreed with funders			
12.2 We monitor our activities and collect information on 'soft outcomes' (case studies, anecdotal feedback etc.)			
12.3 We evaluate the results of our monitoring activities			
12.4 We measure our performance against indicators or quality standards			
Notes:			

13. Planning our Service Provision	No	Nearly	Yes
13.1 We use monitoring data and user feedback to plan our services			
13.2 We have a work-plan or development plan and review it regularly (short, medium or long-term, as appropriate)			
13.3 We have a business plan (if applicable) and review it regularly			
13.4 Our planning process involves staff, volunteers (as appropriate) and trustees			
13.5 We involve service users in the planning process (indirectly, through feedback or directly, through representation)			
Notes:			

14. Networking and Partnerships	No	Nearly	Yes
14.1 We actively network with other organisations			
14.2 We work in partnership with other organisations			

14.3 We evaluate our partnership working and include this info when planning			
Notes:			

15. Resources and Information Technology	No	Nearly	Yes
15.1 Overall, we have sufficient resources to deliver our services effectively			
15.2 Our premises have been assessed for health and safety			
15.3 We use computers in several areas of our work (not just for typing letters)			
15.4 We back up our work on a regular basis (at least monthly)			
15.5 We have adequate technical knowledge or support, to cope with problems			
Notes:			

Please use the box below to list other things in your organisation which you feel are relevant: This could be particular areas that require support/and or issues you feel have not been covered in this Healthcheck.

Organisation Name:

Name of person completing this form:

Contact details:

Date:

For more information or support after completing this organisational health check, have a look at the wide range of information sheets available from Devon Voluntary Action (DeVA) at http://www.devonva.org/information_and_guidance or please contact DeVA on 0845 6099901 or by emailing support@devonva.org.