

# 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.

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

<b>2. Information on services and promotion of work</b>	No	Nearly	Yes
2.1 We have an up-to-date leaflet or written information on our services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.2 We have a website or webpage with up-to-date information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.3 We make information available to users with special needs, on request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.4 We produce an annual report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.6 We make use of the media to promote our work (press releases, radio etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

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

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

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

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

<b>7. Compliance</b>	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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.2 We comply with statutory regulation and have clear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

<b>8. Equal Opportunities</b>	No	Nearly	Yes
8.1 We have an Equal Opportunities policy that applies to all areas of our work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.2 We comply with the Equality Act (2011) legislation, including for recruitment of staff and volunteers and the provision of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.3 We monitor Equal Opportunities and use this information to develop our services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

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

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

10.7 We hold exit interviews with volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

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

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

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

<b>14. Networking and Partnerships</b>	No	Nearly	Yes
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14.1 We actively network with other organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.2 We work in partnership with other organisations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.3 We evaluate our partnership working and include this info when planning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

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

Please use the space 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](http://www.devonva.org/information_and_guidance) or please contact DeVA on 0845 6099901 or by

emailing [support@devonva.org](mailto:support@devonva.org).