



www.telfordandwrekin CVS.org.uk



TELFORD & WREKIN CVS

HEALTH CHECK

What Does Your Organisation Do?

Name of Organisation			
Name of main contact			
Address			
Tel No:		E-mail:	
Website			
When were you set up?			
Number of Volunteers		Number of Staff	
Main Services What are you trying to achieve?			
Client group age range			




Health Check

This health check has been designed for your organisation to assess its strengths and weaknesses. Please answer the following questions with a tick in the appropriate box.

After the final set of questions please total up your green, yellow and red box totals and then look at the analysis.

(Please tick)

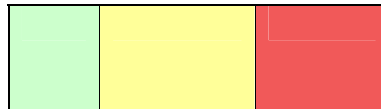
(If you wish to make any comments please use the reverse side of the sheets)

1. Running your Organisation	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Do you have rules (a constitution)? <i>Chapter 1 Fact Sheet 3</i> <i>Chapter 1 Fact Sheet 10</i>					Lack of clarity of aims/person making decisions		
Do you have a chair? <i>Chapter 1 Fact Sheet 6</i>					Legal compliance		
Do you have a treasurer? <i>Chapter 1 Fact Sheet 6</i>					Legal compliance		
Do you have a secretary? <i>Chapter 1 Fact Sheet 6</i>					Legal compliance		
Do you keep a record of meetings? <i>Chapter 1 Fact Sheet 7</i>					No record of events/agreements/actions		
Do you hold an Annual meeting? <i>Chapter 1 Fact Sheet 8</i>					Compliance not met, with constitution		
Do committee members have a copy of your Constitution? <i>Chapter 1 Fact Sheet 3 and 10</i>					No clarity of organisational aims		




1. Running your Organisation continued	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Do the committee receive operational updates?					Important organisational decisions are made using outdated information		
Has your committee had training in the past 2 years? <i>Chapter 6 Appendix 10</i>					Lack of information for volunteers which may be legal		
Is your organisation a charity?					May exclude certain funding resources/ Legal compliance re financial threshold		
Is your organisation a company?							
Does your organisation have a clear mission statement/aim?					Lack of clarity about why the group exists		
Does your organisation have a business plan?					Lack of planning can lead to uncertain financial future		
Does your organisation have committee members with written roles and responsibilities?					Committee members are not clear about what is required from them		
Do your committee members receive an induction pack?					Lack of awareness of roles and responsibilities of committee members		

1. Running your Organisation continued	N/A	☺ We do!	☹ We are Working On it!	☹ We don't!	Risk factors if you don't	Practice	Evidence
Does your organisation have an operational plan? <i>Chapter 1 Factsheet 12</i>					The direction and focus of the organisation is unknown		
Does your organisation consult with its users? <i>Chapter 2 Factsheet 18</i>					Services are developed which are unused. Less grant funding available - as not able to "demonstrate need"		
Does your organisation regularly review its progress against its plans? <i>Chapter 1 Factsheet 12</i>					The organisation is unable to develop as it had planned.		

Total



**Running your Organisation
Comments**

2. Your staff, volunteers and user groups	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Are recruitment and selection processes clear and fair and adhering to all equality requirements?					Legal compliance not adhered to.		
Do staff/volunteers receive induction training?					Lack of awareness about policy and procedure		
Is information about training opportunities shared fairly?					Equal opportunities is breached by the organisation		
Do Board members, staff and volunteers work together developing quality and action plans?					A divided organisation		
Do your volunteers receive training? <i>Chapter 6 Appendix 10</i>					Volunteers are not informed/Retention of volunteers may decline – volunteers may move on		
Do your volunteers receive supervision? <i>Chapter 6 Appendix 23</i>					Volunteers may leave/problems with volunteers may not get picked up		
Do your staff receive training?					Staff are not informed or updated/Lack of opportunity for professional development		
Do your staff receive supervision? <i>Chapter 3 Fact Sheet 6</i>					High Staff turnover/Lack of leadership		
Do you have staff policies in place?					Operate illegally		

2. Your staff, volunteers and user groups Continued	N/A	☺ We do!	☹ We are Working On it!	☹ We don't!	Risk factors if you don't	Practice	Evidence
Do you have employment contracts for staff? <i>Chapter 3 Fact Sheet 5</i>					Legal compliance not adhered to.		
Do you have volunteer policies? <i>Chapter 5 Fact Sheet 6</i>					Lack of clarity of roles and responsibilities/Legal responsibilities		
Are User groups clearly defined and targeted to prevent unfair exclusion from services?					In equality and inaccessibility issues with services provided		
Are services based on needs highlighted by users?					Services are under used and ineffective		
Is the personal information kept meeting data protection requirements?					Legal compliance is not adhered to.		
Is user feedback encouraged and recorded and complaints dealt with openly and promptly?					Reputation of organisation is at risk. Do not carry out best practice		




Total

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**Your staff, volunteers and user groups
Comments**




3. Finance Liability and Resources	N/A	😊 We do!	😐 We are Working On it!	😞 We don't!	Risk factors if you don't	Practice	Evidence
Does your organisation have a bank account? <i>Chapter 1 Fact Sheet 4</i> <i>Chapter 3 Fact Sheet 2</i>					Funders will not be able to award		
Do you have 3 signatories who do not live at the same address to release funds from the bank account? <i>Chapter 3 Fact Sheet 4</i>					Funders like to see 2 out of 3 signatories/Funders don't like signatories at the same address. May not award funding		
Does your organisation have liability insurance? <i>Chapter 3 Fact Sheet 1</i>					Committee members become financial liability		
Is the equipment owned by the organisation covered on your insurance? <i>Chapter 3 Fact Sheet 1</i>					No replacement in the event of damage or burglary		
If your organisation gives advice to your users do you hold insurance to protect your volunteers? <i>Chapter 3 Fact Sheet 1</i>					Legal compliance/Financial liability		
Do you pay out of pocket expenses to volunteers? <i>Chapter 6 Appendix 13</i> <i>Chapter 5 Fact Sheet 8</i>					Volunteers leave		

3. Finance Liability and Resources continued	N/A	☺ We do!	☹ We are Working On it!	☹ We don't!	Risk factors if you don't	Practice	Evidence
If employing staff does your organisation meet Inland Revenue requirements? <i>www.hmrc.gov.uk</i>					Legal compliance is not adhered to.		
In line with its aims, does the organisation identify a range of possible income which is planned ahead?					Viability of the organisations future aims are at risk		
Does the organisation meet HM Revenue & Custom requirements? <i>www.hmrc.gov.uk</i>					Legal compliance is not adhered to.		
Are there written financial procedures?					Financial processes not transparent		
Is income and expenditure accurately recorded?					Legal non-compliance		
Are there enough resources to deliver services planned for the current year?					Poor service		
Are premises secure, welcoming and accessible to all?					Legal compliance is not adhered to.		
Do working practices meet all health and safety and other legal requirements?					Legal compliance is not adhered to.		

3. Finance Liability and Resources continued	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Does the organisation considers its environmental responsibilities and takes steps to reduce waste, recycle and shop ethically?					Damage to reputation of the organisation		
Is there an orderly and accessible system for storing information and is all electronic information secure and backed up?					Legal compliance is not adhered to.		
			Total				

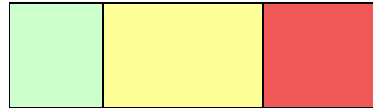
**Finance Liability and Resources
Comments**

4. Policies	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Does your organisation work with children and young people or vulnerable adults? <i>If NO skip next 4 questions</i>							
Are your staff/volunteers CRB checked? <i>Factsheet is being developed</i>					Child protection incident happens/children, staff and volunteers not protected		
Does your organisation have a child protection policy? <i>Chapter 4 Fact Sheet 2 and 3</i>					Safety of children and young people Safety of staff and volunteers		
Does your organisation offer opportunities to staff/volunteers in contact with children to undertake child protection training?					Safety of children and young people Safety of staff and volunteers		
Does your organisation have a vulnerable adults policy?					Safety of vulnerable adults, staff and volunteers		
Does your organisation have an equal opportunities policy statement?					Legal compliance is not adhered to.		
Does your organisation have a disability statement?					Legal compliance is not adhered to.		

4. Policies continued	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Does your organisation have a complaints procedure?					Do not carry out best practice		
Does your organisation have a Health & Safety policy?					Health & Safety of staff, beneficiaries and volunteers/Contractual and legal implications		
Does your organisation have a Health & Safety Risk Assessment Policy?					Health & Safety of staff, beneficiaries and volunteers/Contractual and legal implications		
Does your organisation have written security guidelines on: - Computer use Lone working Visits/off site working Violence and aggression Key holders First Aid Officer					Health & Safety of staff, beneficiaries and volunteers		
Does your organisation have a Data Protection or a Confidentiality Policy?					Legal compliance Is not adhered to/confidentiality is not protected.		

4. Policies continued	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't	Practice	Evidence
Does your organisation have a Computer Use Policy?					Confidentiality/personal security issues are breached.		
Are your plans and policies reviewed regularly?					Danger of not meeting legislation as reviews are not made.		

Total



**Policies
Comments**







5. Funding

N/A



Risk factors if you don't

**Funding
Comments**




6. Communicating and Working with Others	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't		
Is the organisation clear about it's key messages to users and stakeholders?					Profile of the organisation and its services unclear		
Does the organisation maintain an up to date contact list of users and stakeholders?					Outdated information		
Does promotional material give clear information about services and contact methods?					Profile and reputation of the organisation unclear		
Does all stationery contain a clear identity of the organisation, its legal status and contact details?					Unclear information about the organisation Legal non-compliance		
Is there a clear understanding of the role of the organisation with partner agencies?					Unclear profile of the organisation and its services		
Is there an identified individual/department who are authorised to write/speak publicly on the organisations behalf?					Unclear public impression of the organisation		
Does the organisation maintain up to date partner agency information?					Outdated agency information inefficient working and duplication of services.		
6. Communicating and Working with Others	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't		

Continued		We do!	We are Working On it!	We don't!		
Does the organisation meet all legal and constitutional requirements relating to work with other agencies?					Legal and constitutional non-compliance	

Total

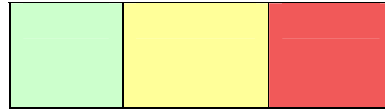
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Communicating and working with others
Comments


7. Monitoring and Evaluation	N/A	 We do!	 We are Working On it!	 We don't!	Risk factors if you don't		
Does the organisation understand what needs to be monitored and evaluated and what purpose this serves?					Failure to collect useful information/"clawback" from funders.		
Does the organisation have a simple/purposeful recording system?					Fails to collect relevant data		
Does monitoring of information include user feedback?					Exclusion of users - not offering service users want		
Does the organisation use information collected in its operational progress and planning?					Develops without accurate information - not offering what service users want.		
Are staff/volunteers skilled and trained in monitoring and evaluation?					Jeopardise future funding/partnerships		
Do findings meet the information requirements of funders and stakeholders?							
			Total				


**Monitoring and Evaluation
Comments**


Final Total



What this means: -

 **Mostly greens – CONGRATULATIONS!!** You are doing very well with your organisational processes. You may need to address one or two specific areas – planning for the future can be supported or reviewed by the CVS. Please contact the CVS on 01952 291350 and ask to speak with the Development Team for help.

 **Mostly yellows -** you may have some areas which need additional support. Please ring the CVS and ask to speak to the Development Team and tell them about the areas where you are currently responding yellow or red. Together we can develop a plan to help address any concerns which may have emerged as a result of the health check.

 **Mostly reds – oops!!** Your organization may be in need of some support - so all you have to do is pick up the phone and ring CVS Development Team on 01952 291350 as support is available. Together we can look at any concerns you may have and find the best route to begin to plan for the future developments needed. Please see fact sheet references throughout the sections.

Are there any areas where you would like support?