

Being aware of your organisation structure and processes is an important part of ensuring it provides good services to the right people in the best way. Use this sheet to check your current position.

Complete this self-assessment by circling the letters on the right of the following statements to indicate your organisation's current position: (G – Green - Fully; A - Amber - Partially; R - Red – Currently do not meet)

Governance and accountability

1. Our constitution/memorandum/mission accurately describes the work we do
2. Our Trustee/management board are aware of their of duties & responsibilities
3. We comply with all the regulations and requirements of an organisation of our type
4. We communicate effectively with all stake holders
5. We assessed the risks involved in delivering our services and have a plan to manage the risks

Meeting clients needs

6. We know who our clients are who we are trying to reach
7. Our service is accessible to our clients
8. Our service meets our clients' needs

Policies - we have policies in place that meet the following statutory requirements

9. Equality Act 2010 (strike through if exceptions apply to your organisation)
10. Health & Safety
11. Employment Act (strike through if this does not apply to your organisation)
12. Adequate insurance appropriate for our services
13. Safeguarding Vulnerable Groups Act 2006 (strike through if this does not apply)

Information Management

14. We comply with Data Protection Act where relevant
15. We keep client details securely
16. We have a confidentiality policy which covers the relevant people in our organisation
17. We have clear policies and procedures in place to ensure that the information we are giving out is accurate and up to date

Staffing

18. Our staff and volunteers are appropriately recruited and inducted into our organisation
19. We ensure that staff and volunteers receive appropriate training and supervision
20. We have the appropriate resources to enable our staff and volunteers to deliver our services

Audit trails and Quality Assurance

21. Our procedures ensure that we can review the service we have given to clients
22. We have clear standards which relate the services we deliver
23. We can be sure of the quality of the service
24. We monitor our services and evaluate their effectiveness
25. We can demonstrate our services meets our aims

Income generation & Finance

26. We have a varied funding stream
27. We ensure that staff and volunteers are aware of good fundraising practices
28. We have a robust reserves policy
29. We have financial processes which ensure everyone that needs to know is aware of our current financial status

Sustainability

30. We have a clear plan to enable us to keep our service going and a realistic understanding of the resources required to run the service now and in the future



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G	A	R
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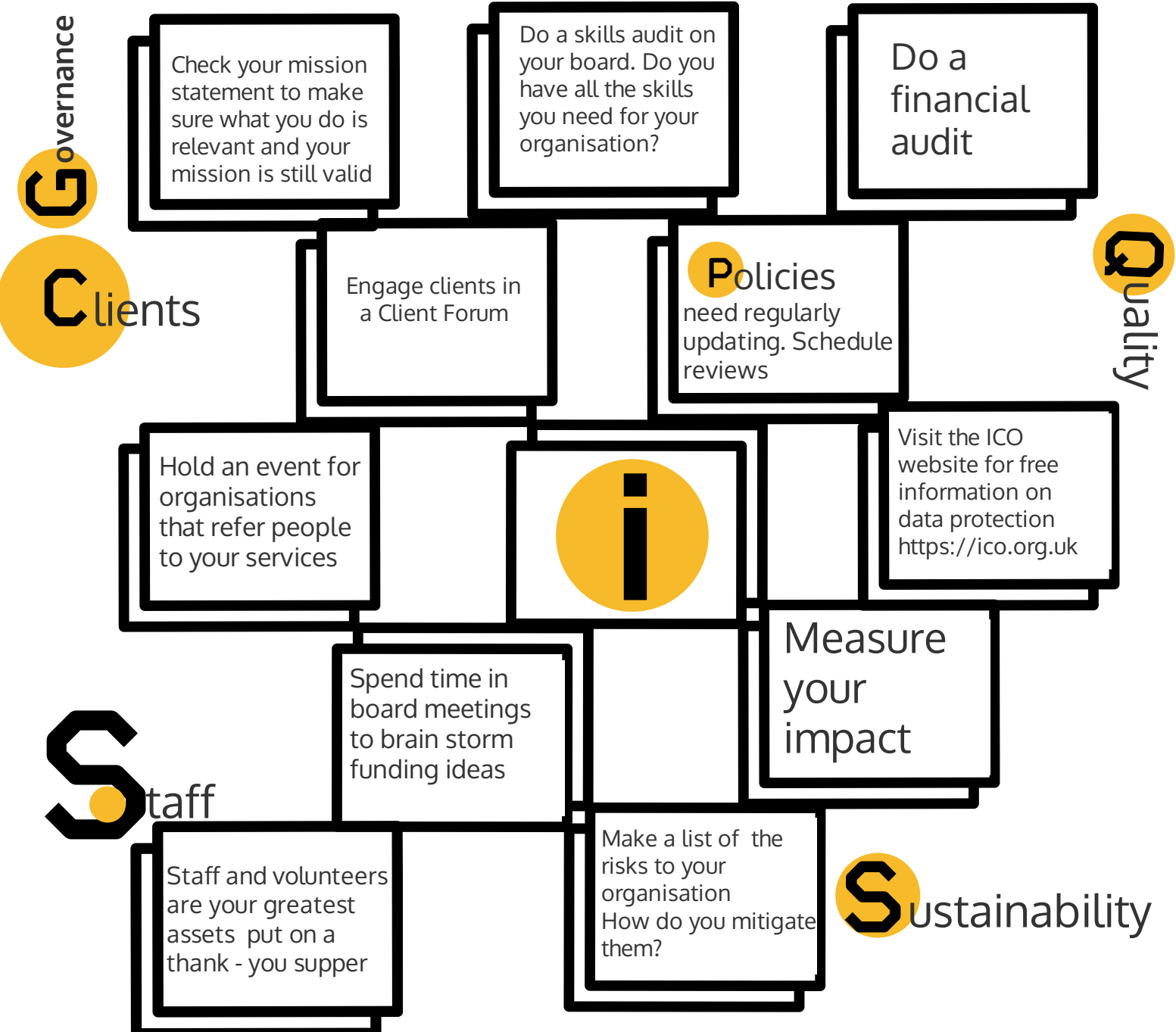
G	A	R
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TOTAL

Turn over the page for hints and tips on how to improve your score.



Running an organisation with a social purpose means understanding how it works and having all the important policies and processes needed in place. Turn over the page and complete the self-assessment to check how your organisation measures up. The Top Tips below suggest ways you can help make your organisation governance and policies more effective.



This work sheet is in a series of organisational development activities aimed at organisations with a social purpose that can be completed in under an hour. For more Clarity and support on any of the above issues visit: www.claritycic.org Email: info@claritycic.org Tel: 01363 860151