Health Diagnostic for Organisations

Introduction

Use this diagnostic tool as a starting point to understand the mechanics of your organisation. Learn to see what you do well, what you need to improve and discover any gaps in your practice that may need to be addressed.

Sections can be completed in isolation or as a whole document and each question highlights a key aspect of practice. You can then describe how you have successfully implemented this aspect or if you have not achieved progress here yet. You can then outline your plan to address any gaps in your practice and make decisions about when this needs to be completed and specify who will be responsible for taking the actions needed to achieve the progress you have decided is important.

There is also a comprehensive self-assessment tool available at [www.charityexcellence.co.uk](http://www.charityexcellence.co.uk) which is available for free, this comes with a number of resources and is a useful tool for your organisation.

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| Volunteers | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| Our staff team supports and acknowledges the role of volunteers in achieving the organisations aims and objectives. |  |  |
| We allocate resources to volunteer involvement / development. |  |  |
| We have a volunteer policy. |  |  |
| We have role descriptions for volunteers. |  |  |
| Our volunteer roles support the overall purpose and direction of the organisation. |  |  |
| Our volunteers are involved in meaningful ways that reflect their abilities and needs. |  |  |
| We have an agreed volunteer recruitment process in place. |  |  |
| We have an information pack which we can send/email to volunteers. |  |  |
| We know how and where to advertise our volunteering roles. |  |  |
| Our interview process for our volunteers is fair and welcoming. |  |  |
| We undertake background checks on prospective volunteers depending on the nature of the volunteering role. |  |  |
| We have the policies and procedures in place to support our volunteers which are communicated to them clearly (for example in a Handbook). |  |  |
| We have a volunteer induction process/policy/procedure. |  |  |
| We provide feedback to our volunteers, to show their contribution is recognised. |  |  |
| We reimburse our volunteers for their expenses. |  |  |
| We provide role specific training for volunteers as well as ongoing training so volunteers can upskill and learn about changes within the organisation. |  |  |
| We have carried out risk assessments of proposed volunteer activities. |  |  |
| Our volunteering roles are covered by Public Liability Insurance.  |  |  |
| We have a designated person or organisation of people responsible for volunteers support and supervision. |  |  |
| We have a framework for providing support/feedback sessions for your volunteers. |  |  |
| We are aware of the legislation in relation to state benefits and volunteering. |  |  |
| We regularly review our volunteering programme. |  |  |
| We would like to provide more support and recognition to our volunteers generally. |  |  |

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| Constitution | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| 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. |  |  |
| The constitution is reviewed periodically to reflect the organisation’s development.  |  |  |

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| Leadership | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| We have an elected committee/board responsible managing the organisation. |  |  |
| There are clear role descriptions for committee/board members and they know what is expected of them. |  |  |
| Training and Induction has been received on roles and responsibilities. |  |  |
| We have carried out a Skills Audit. |  |  |
| Elections are clear and fair. |  |  |
| Elections are publicly advertised. |  |  |
| We meet at least every 3 months. |  |  |
| Agenda is send at least a week in advance. |  |  |
| Meetings are well attended. |  |  |
| Accurate minutes are taken at meetings. |  |  |

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| Policies and Insurance | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| We understand which policies are necessary to our organisation and why. |  |  |
| We have someone who leads a regular review of policies |  |  |
| We have a mechanism in place to review policies on a regular basis |  |  |
| We have adequate insurance to deliver our activities. |  |  |

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| Planning | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| 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  |  |  |
| We have a three year plan and review our performance regularly. |  |  |
| We have a business plan or development strategy. |  |  |
| We are confident that our stakeholders know what our organisation is about. |  |  |
| We monitor our work and use the feedback to inform our future planning |  |  |
| 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 know who our local Councillors are,  |  |  |
| We are aware of other organisations in our area, what they do. |  |  |
| We network with other organisations. |  |  |

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| Finance | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| We have proper bookkeeping 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 organisation and prepare annual budgets in advance of each financial year. |  |  |
| We have a funding strategy in place. |  |  |
| 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 organisation and how to explore them and whether they’d be right or not for the organisation. |  |  |
| 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. |  |  |

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| Communication | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| 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 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 organisation to utilise digital systems well. |  |  |

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| Staff | Have we achieved this? If not, how do we intend to? | Who will be responsible / When will it be complete? |
| Every member of staff has a written contract of employment. |  |  |
| Every member of staff has a written job description. |  |  |
| Staff are paid on time and supplied with an appropriate pay slip. |  |  |
| Staff have access to the organisation’s policies and procedures.  |  |  |
| Staff have access to regular and documented support/supervision sessions.  |  |  |

💡*Need more support?*

Wirral CVS is here to help your organisation grow, develop and succeed. Whether you’re just starting out or strengthening your foundations, our Development Team can provide one-to-one guidance, training, resources and advice tailored to your needs.

Contact us to book a support session

**📧 Email:** *info@wirralcvs.org.uk*

**📞 Phone:** *0151 433 3371*

**🌐 Website:** *www.wcvs.org.uk*

📄 *More resources available at:*

[**www.wcvs.org.uk/support**](file:///C%3A%5CUsers%5CLewisHall%5CDownloads%5Cwww.wcvs.org.uk%5Csupport)

Including templates, guidance and policy tools across governance, finance, safeguarding, volunteering and more.

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