

Tools for success: Self-assessment tool

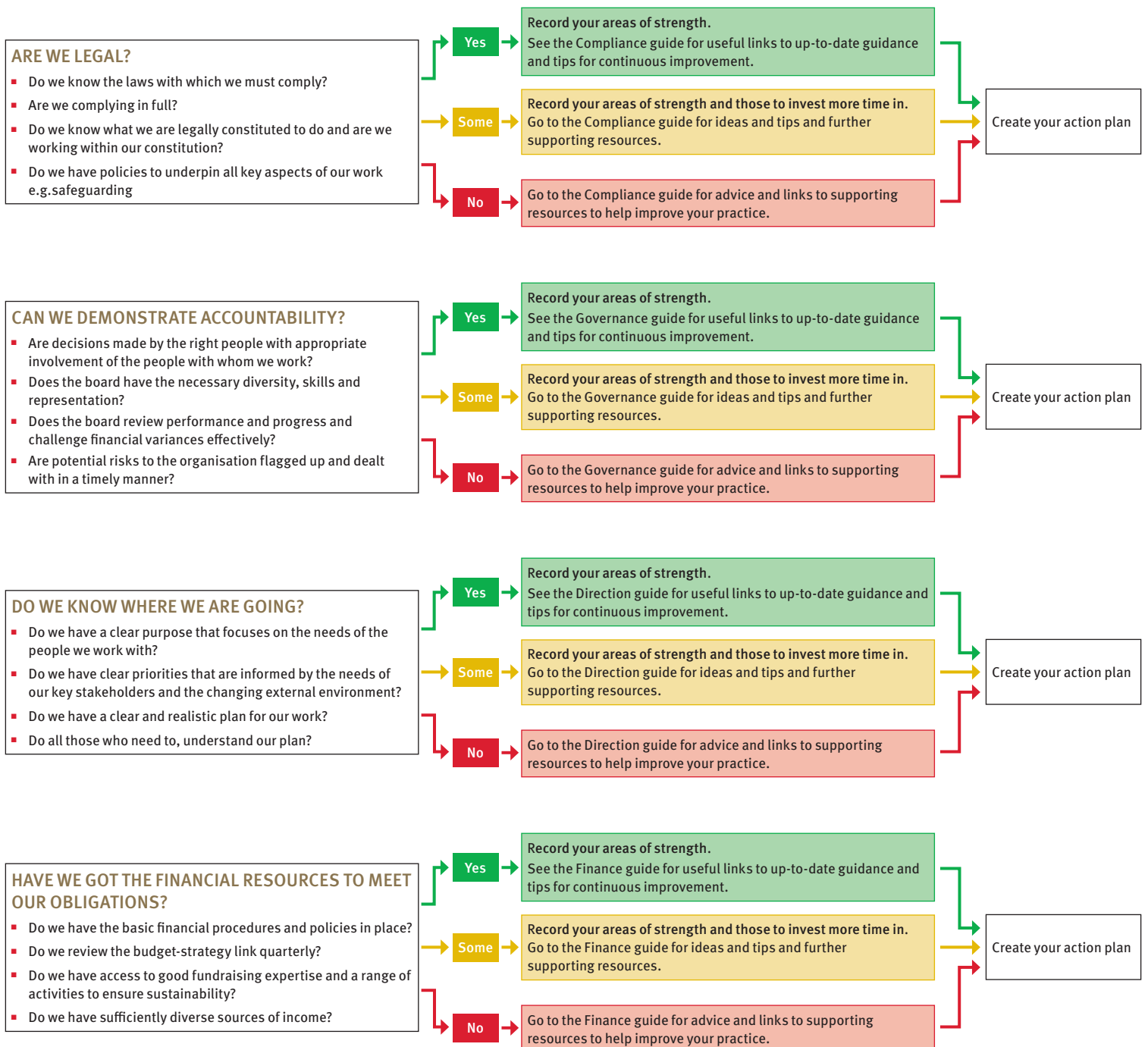
Seven areas of organisational capacity have been identified as fundamental to a charity's success and long-term sustainability. This self-assessment tool sets out some important questions to ask yourself, to determine your areas of strength and to prioritise the areas where you need to invest more time.

Step one:

Consider each set of questions below in sequence. Record your responses using the self-assessment recording tool.

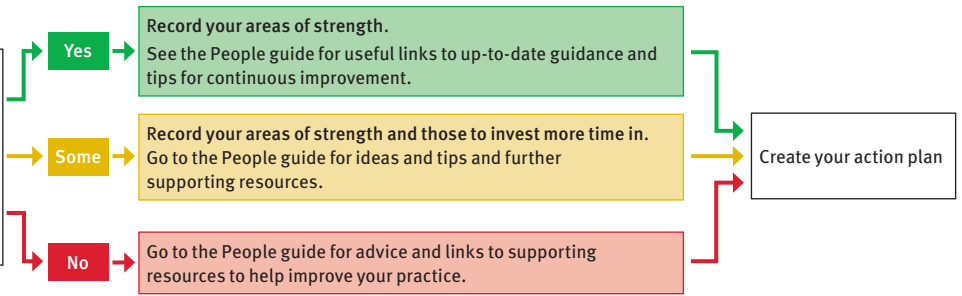
Step two:

Create an action plan based on your responses, using our action planning template (or your own).



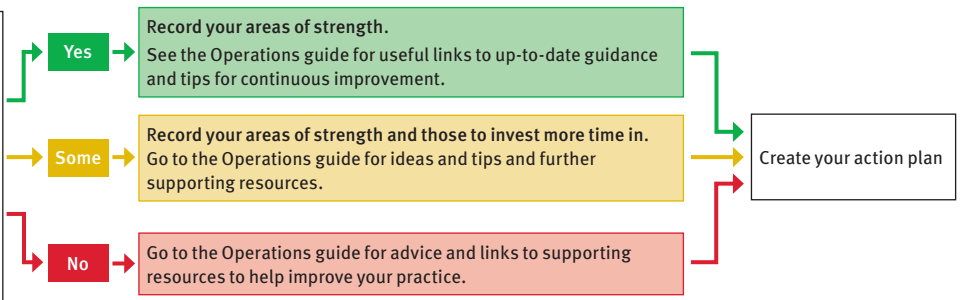
HAVE WE GOT THE RIGHT PEOPLE AND SKILLS?

- Do we have the essential HR policies and procedures in place?
- Do we carry out performance management and is it effective?
- Do internal communications work effectively for all involved?
- Are there opportunities and resources to ensure diversity, equity and inclusion as well as staff and volunteer development and learning?



ARE WE EFFICIENT AND EFFECTIVE IN MEETING OUR OBJECTIVES?

- Have we mapped out the important activities and linked these to agreed objectives and outcomes?
- Are new developments sought out and implemented effectively?
- Is the quality of delivery monitored and evaluated effectively, with learning built into the future?
- Is there a process for learning from our achievements and mistakes?



DO WE WORK WELL WITH OTHERS?

- Do we know who the key players are in our world?
- Do we understand their needs and our position in relation to those needs?
- Do we carry out activities to ensure that our profile in the community is as we want it to be?
- Do we actively seek out relevant partnerships?
- Do we take positive, active steps to include those who are marginalised and support them to find their voice?

