

A Fund-raising Health Check

A self-assessment checklist

Name of organisation:

Date completed:

This checklist will help your organisation to assess how well you meet the requirements of funders and supporters. A wide range of people should ideally be involved in completing this checklist (trustees, members of staff, young people and volunteers) as there may be completely different opinions about how your organisation is working and what it is achieving.

1. Meeting a clear need

It is important that all services provided are in response to meeting a particular social need in the community, takes into account the views of the people/target users, most especially the needs of those who are most isolated and marginalised.

	Comments
Is your user group clearly defined?	
Do you have statistics about the people/target users in your area?	
Do you have a clearly stated purpose?	
Do you ask people/target users what they think of your services?	
Do you keep records of services provided and enquiries dealt with?	
Do you regularly review and evaluate your services?	

2. Planning

The most successful organisations are those that plan effectively. Good planning will mean your organisation will achieve more and will have a greater impact.

Do you have an annual plan that is written and implemented?	Comments
Do you have a long term plan e.g. 3-5 years?	

3. Ensuring that you are a well run organisation

Organisations must meet the legal requirements placed on a charity. They must also meet general legal requirements as employers and service providers: licensing, employment, health and safety and equal opportunities.

Charity Law	Comments
Are you registered as a charity?	
Do you have a written constitution that is up to date and covers all your activities?	
Are your management committee members aware of their legal powers and duties and their personal responsibilities?	
Do you return your annual reports and accounts as required by the Charity Commission and SORP?	
Are you aware of the legal and licensing requirements for activities and fundraising? • Trading • Collections • Lotteries and raffles	

Management Committee	Comments
Does the management committee meet often enough to carry out its business?	
Do you have members with relevant experience?	

How do you support the people/target users representatives on the management committee so that they can participate effectively?	
Do members have clear roles and responsibilities?	
Are meetings well organised?	
Are effective decisions made?	

Equal Opportunities	Comments
Do you have an equal opportunities policy/statement?	
Do you comply with the laws relating to equal opportunities?	

Premises and equipment	Comments
Do your premises meet your needs?	
Are your premises and equipment properly insured? • Public liability • Employers liability • Buildings insurance	

Health and Safety	Comments
Do you have a written health and safety policy?	
Do you carry out regular risk assessments?	

If your work with the people/target users involves food, does food storage, preparation and delivery meet relevant legislation?	
Are vehicles and equipment well maintained?	

People	Comments
Do you have procedures for staff and volunteer recruitment and selection?	
If you employ staff do they have job descriptions, contracts and terms of employment?	
Is there a clear line management structure?	
If you employ staff do you have employment policies for grievance, disciplinary, induction, sickness, holidays, pay, expenses and redundancy?	
Do you provide regular support and supervision for staff and volunteers?	
Do you have a volunteer policy?	

Training	Comments
Is training provided for • Management Committee? • Staff? • Volunteers? • Young people?	

Other policies	Comments
Do you have a confidentiality policy?	

If you work with Children & Youths: Do you have a child protection policy and a set of child protection procedures?	
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Finance	Comments
Is all income clearly recorded and accounted for?	
Do you have systems in place to provide good internal controls and are these written down? • Banking and cheque signing • Petty cash • Retention of receipts • Authorisation of expenditure	
Do you produce an annual budget?	
Does the committee get regular financial reports (at least quarterly)?	
Are your accounts audited or independently examined?	

Partnerships	Comments
Do you have good contacts with other relevant agencies in your area?	
Is written information about your organisation and services available to other organisations?	
Do you hold information about other relevant organisations?	

Celebrating success	Comments
Do you make sure that other people and organisations know about your successes?	
Do you have good contacts with local media?	

4. Finding resources

When you are sure that you can meet the requirements of funders **then** you are best placed to start to look for funding

Do you have a plan of what you want to do?	Comments
Do you know how much money, people and equipment you need to achieve your plans?	
Do you have enough information about sources of funding and other resources?	
Do you have the skills and expertise in making good applications?	

Next Steps

Now that you have completed this checklist you will probably have identified many issues and areas of work that you need to work on before you can begin to fund-raise. You can begin to list them, this will form the basis of your fund-raising action plan and act as a guide for the one to one advice sessions you attend.