



Project 2020 - Organisation Self Assessment

This assessment aims to help you think about how your organisation is doing at the moment, and what further work you will need to do in order to become eligible for social investment. It is based on the business plan template we'll be using during the programme which was developed by social investors to help them make their decision on whether or not to offer support.

If it is to work well for you, the assessment should involve several people's viewpoints. We have written so it can easily be shared in a discussion-based process.

The information you give us will be treated as business-sensitive and will only be shared with BBRC and other organisations who are part of the Connect Fund programme. We'll use it to help us plan the programme and make sure we are meeting your needs, and to evaluate how well the programme is working for all participants. No detail about specific organisations scoring will be shared with other members of the network.

This isn't a scientific tool; don't worry too much about detail, just give us a picture of your current thinking about where you stand for each indicator. If you don't understand an indicator, please contact us for an explanation.

There are six sections, each looking at a different area. Section 6 assesses how far you have come in identifying, and planning for, income-generation. It may well be that you are still right at the start of this process and that's fine; the purpose of including this is to see how we can best support you, not to exclude you from the Programme.

Instructions

Step 1) Print out the assessment document (you won't be able to complete it on screen).

Step 2) Work through each section. Start each one by looking at the summary paragraph at the start of each section. This describes excellence under that heading, for you to use as a benchmark.

Step 3) In your group, discuss how you feel you match up. Think about where you are now, not where you'd like to be in the future.

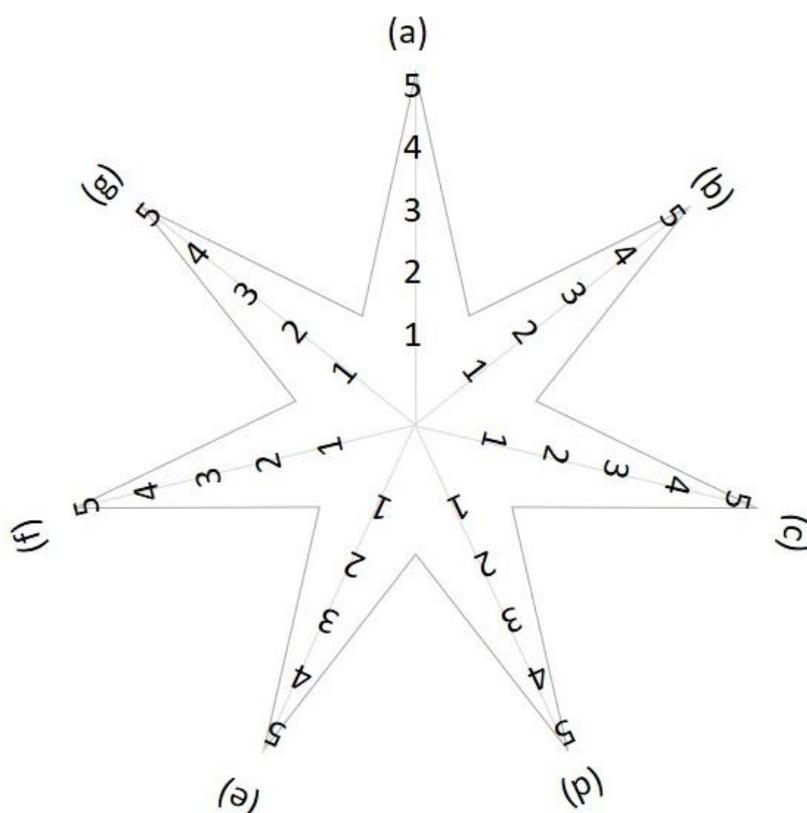
Step 4) Agree a score for each indicator shown (5 means you are excellent, 1 means that you aren't really achieving yet).

Step 5) Mark your scores on the star. The letter at the tip of each point corresponds to the letter in the box below. For example, in Section 1 you will mark your score for "Volunteers managed and utilised appropriately" on point "e" of the star.

Step 6) Where you've scored low, think about what you want to do in order to improve your score. Add any actions to the box.

1) Current team and operations

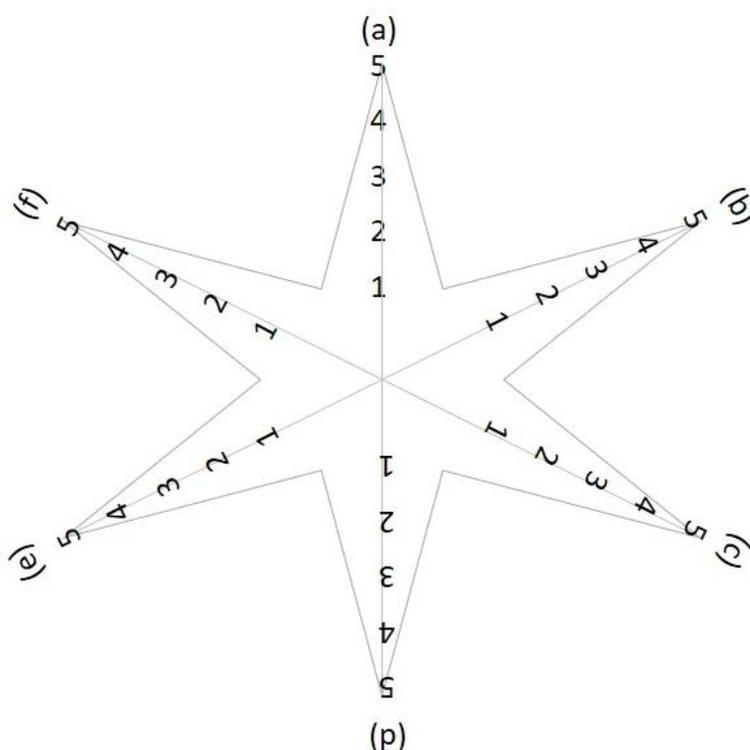
Your current team, volunteers, staff and Board, are all skilled and experienced enough to do their role well. They work in a clearly-defined structure with clarity of roles and lines of communication. Job and role-descriptions are up-to-date and fit your current strategic aims. You understand and work to all the best-practice guidelines for your governance structure. You aren't missing any key people, or relying on volunteers in a way that could be a risk; for example for bookkeeping or payroll.



Indicator	Actions
a) Professional manager/s with appropriate skills and experience	
b) Directors/Trustees with appropriate skills and experience	
c) Best practice governance structure and procedures	
d) Skills and experience of staff and volunteers match need	
e) Volunteers managed and utilised appropriately	
f) Policies and procedures up-to-date and properly implemented	
g) Staff team structure clearly defined and meets your needs	

2) Mission, impact and quality

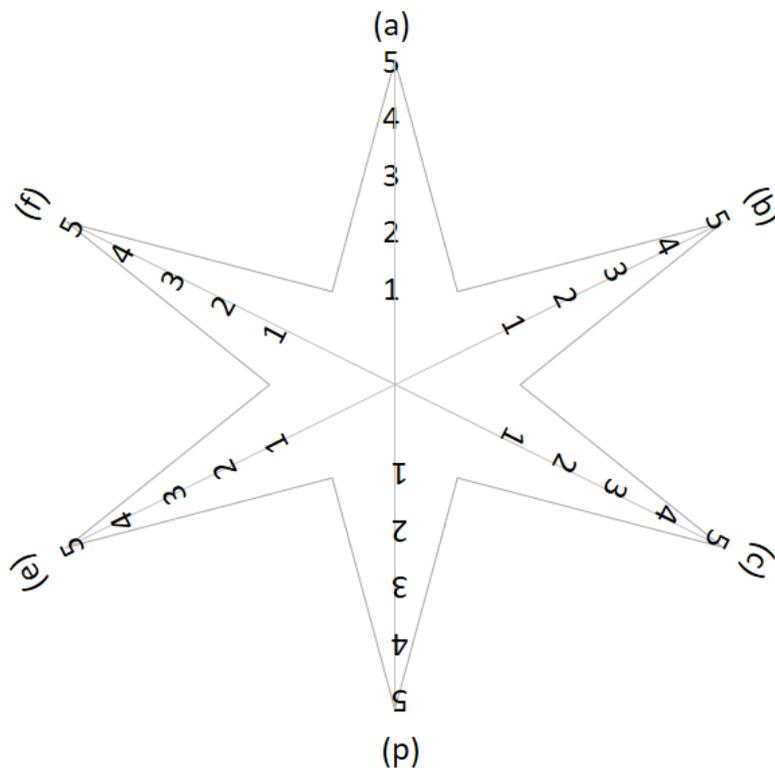
You focus on the most important actions, as identified by your service users and external data. You work to continually improve your services and increase the impact of what you do. Your organisation has a Theory of Change that shows in detail how you achieve your impact, and your evaluation questions match this. Everyone in the organisation is clear about your mission and purpose, and knows what you are working towards. Consulting service users, members and the wider community is built into the way you work. If you undertake work that requires professional registration or particular quality standards (such as advice services) you achieve the highest possible standard.



Indicator	Actions
a) Activities aim to meet important current needs	
b) Impact can be clearly stated and evidenced	
c) Evaluation information used for continuous improvement	
d) Strategy driven by service users	
e) Continuous evaluation and monitoring linked to strategic goals	
f) Appropriate regulatory standards met (only to be answered if you provide services such as advice that require external standards are met.)	

3) Market knowledge, community, partnerships

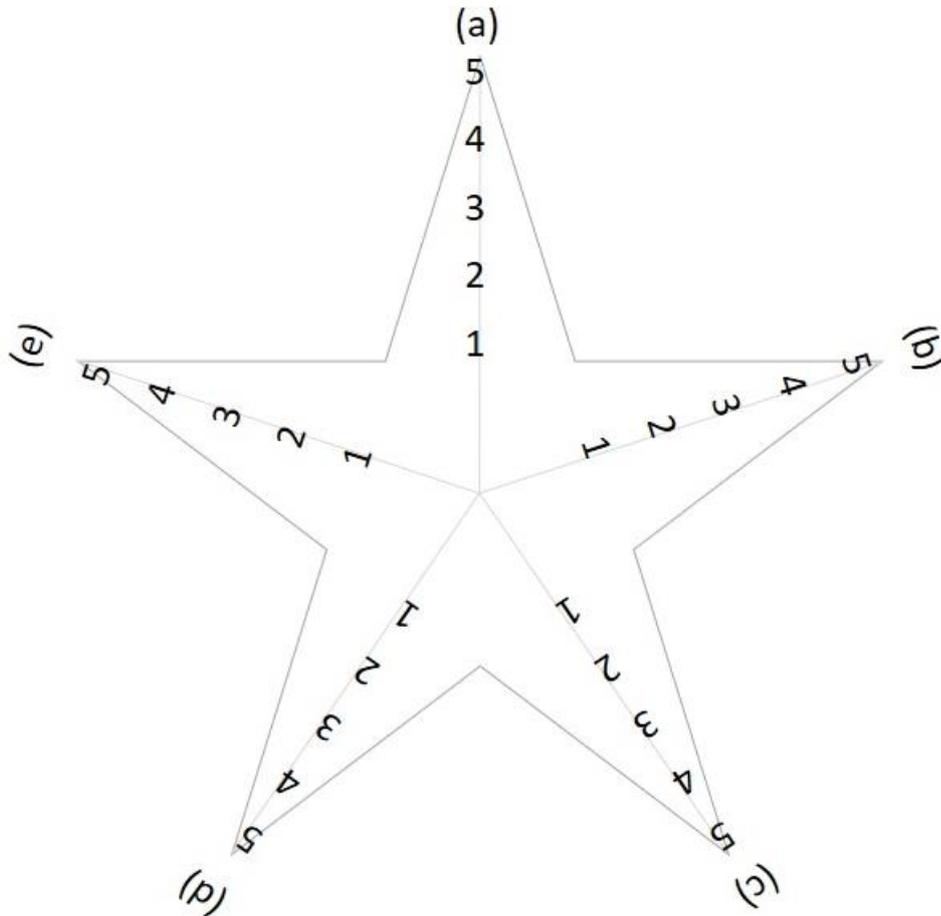
Your organisation is very well-informed and well-networked. You take care to make and keep positive links with funders and other key stakeholders, with a strategic approach to communication. You regularly consult with your wider community - not just your members and service-users. You keep updated on what is changing, including new organisations or projects working in your geographical or subject area.



Indicator	Actions
a) Up-to-date info on community needs	
b) Up-to-date info on other organisations in your area of operation – competition	
c) Membership of networks	
d) Works in formal or informal partnership with other organisations or agencies	
e) Positive relationship with key stakeholders	
f) Regular consultation with wider community	

4) Strategy

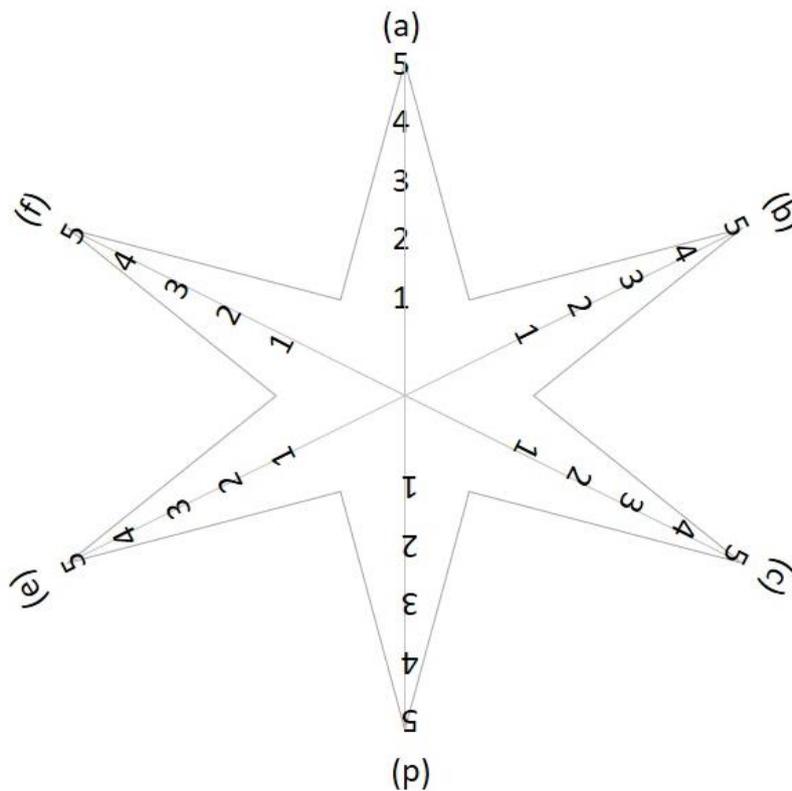
All decisions on strategy and operations are made on the basis of a thorough, well-researched and regularly updated business-plan. The business plan has detailed projected budgets that are used as the basis of a funding and income strategy with targets and actions laid out. As part of this strategy you are already considering, or have, an activity that generates a surplus.



Indicator	Actions
a) Business Plan, regularly monitored and updated	
b) Income/Funding strategy, regularly monitored and updated	
c) Budgets and forecasting for at least 12 months ahead	
d) Current funding mix includes diverse sources	
e) Already have developed income-generation plans	

5) Financial management

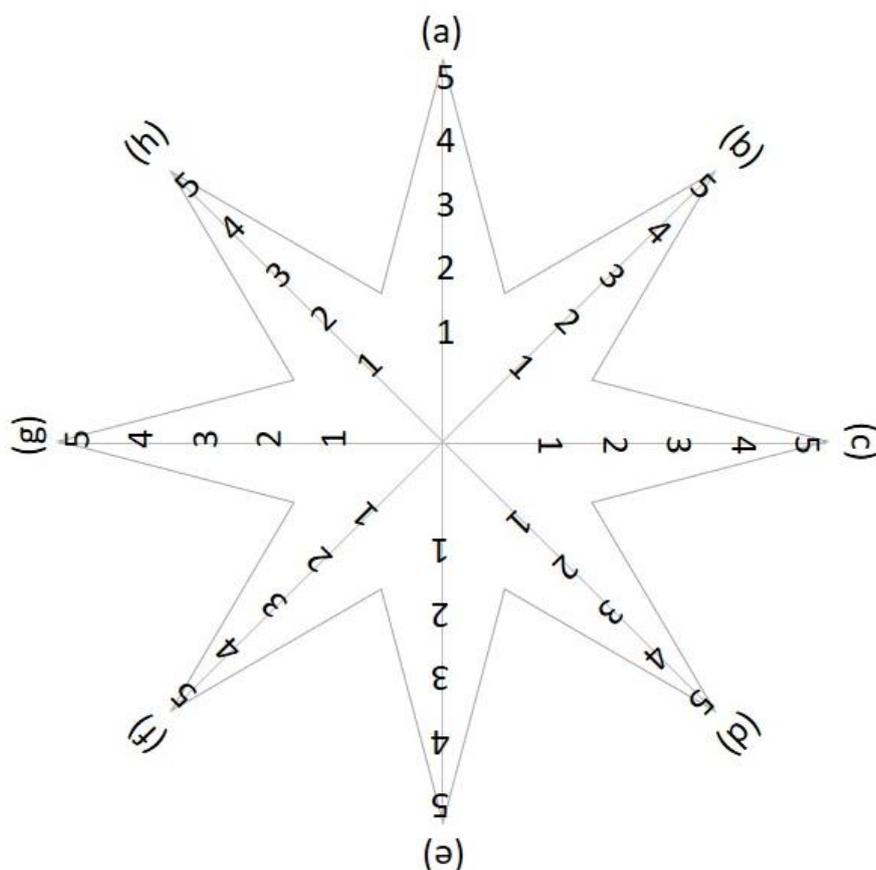
Your Board and senior staff are financially literate and comfortable with financial data. You have a robust finance system that means payments and financial processes are overseen and audited, and that can always provide up-to-date and accurate financial information when required. Your current financial position is reasonably secure and if you own an asset it is in good repair and not facing any unexpected and unsupported expensive repairs. You take appointing a good auditor and other professional advisors seriously, and consult with your auditor when necessary. You have a full and regularly updated financial risk log.



Indicator	Actions
a) Financial systems appropriate to current size and income types	
b) Financial management skills in Board and staff team	
c) Current experience of income generation	
d) Current financial stability	
e) Current resources and property in good order	
f) Strong audit and risk management systems	

6) Future Income generation

Your Board is well-informed about income-generation and is completely supportive of exploring including social finance in your funding mix, as is your wider community. Your organisation already has experience in successful income-generation from one or more sources, or you have already identified and scoped out a future opportunity. This scoping includes market-research, identifying possible partners, skills development needs, risks and budgets.



Indicator	Action
a) Ideas for future income generation identified and scoped	
b) Any additional skills needs identified	
c) Any additional resource needs identified	
d) Partners identified	
e) Service users and wider community consulted	
f) Market research undertaken	
g) Risks identified and evaluated	
h) Board informed, involved, supportive	