

About this guide

Eight areas of organisational capacity have been identified as fundamental to your success and key to long term sustainability. It is vital that you have the capacity to operate at maximum capability. We have therefore set out some big questions for you to ask yourself, to determine your areas of strength and to prioritise the areas where you need to invest more time.

The self assessment questions (see page 4 overview) will help you to choose the right guide for you.

You will need to use your answers from the self assessment to complete the 'action planning' task (see page 3) which will help you build some realistic next steps.

A free online version of the self assessment tool is available on KnowHow NonProfit – Cass CCE's online knowledge resource for the non profit sector – www.knowhownonprofit.org/tools-for-success/self-assessment. On completion, you can print a report listing all your findings and giving advice on areas to be strengthened.



Tools for success: doing the right things and doing them right

2. Self-assessment



Details of further support available from Cass CCE, including our Expert Support Service, consultancy and workshops can be found at www.cass.city.ac.uk/cce/resources/its

Extra support

- List the areas where you need to do more work.
- Take a quick look at the relevant guide, to get some ideas.
- Make a short list of bullet points for each area you need to work on; state your ideas about next steps for each and who should help you.
- Share it with colleagues at work to see what they think.
- Decide the priority order for the activities: number each, starting with the most important
- Be realistic and ruthless
- List all the resources and expertise you have at your disposal
- Seek out a Centre for Charity Effectiveness coach if you need support or an extra sounding board.
- Finally, with your shortlist of priority tasks to hand, go back to the relevant guide and start the detailed investment work.

Things to invest more time in developing

- List the areas that the self assessment has revealed as your strengths.
- For each, start collecting evidence of performance and try to build on them – to do things even better (see the relevant guide for help with each of these tasks).

Things to celebrate and strengthen

Things to celebrate and strengthen	Things to invest more time in developing
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It's important to celebrate what you do well, as well as plan to strengthen all aspects of your organisational capacity. To record what you need to do, draw up a two-column plan, with the following headings:

Action planning

1. Introduction
2. Self assessment
3. Compliance
4. Governance
5. Direction
6. Finance
7. People
8. Operations
9. Networks
10. Revitalise

Tools for success: doing the right things and doing them right

We have developed guides for the eight key areas of organisational capacity that are fundamental to a charity's success.

The self-assessment questions in this guide will help you to choose the 'Tools for success' guides that are right for you.

You can use your answers from the self-assessment to complete an 'action planning' task which will help you to build realistic next steps.


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Self-assessment

Are we legal?

- Do we know the laws with which we must comply?
- Are we complying in full?
- Do we know what we are legally constituted to do?
- And are we working within our constitution?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **COMPLIANCE GUIDE**

 **3. Compliance**

Can we demonstrate accountability?

- Are decisions made by the right people with appropriate beneficiary involvement?
- Does the Board have the necessary skills and representation?
- Does the Board review progress and challenge financial variances effectively?
- Are potential risks to the organisation flagged up and dealt with in a timely manner?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **GOVERNANCE GUIDE**

 **4. Governance**

Do we know where we are going?

- Do we have a clear purpose that focuses on beneficiary needs?
- Do we have clear priorities that are informed by the needs of our key stakeholders and the changing external environment?
- Do we have a clear and realistic plan for our work?
- Do all those who need to, understand our plan?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **DIRECTION GUIDE**

 **5. Direction**

Have we got the financial resources to meet our obligations?

- Do we have the basic financial procedures and policies in place?
- Do we review the budget-strategy link quarterly?
- Do we have access to good fundraising expertise and a range of activities to ensure sustainability?
- Do we have sufficiently diverse sources of income?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **FINANCE GUIDE**

 **6. Finance**

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 staff development and learning?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **PEOPLE GUIDE**

 **7. People**


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?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)

No → If your response to any of the questions is 'no', go to the **OPERATIONS GUIDE**

 **8. Operations**

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?
- Is our profile in the local community as we want it to be?
- Do we actively seek out relevant partnerships?

Yes → If you answer 'yes' to all, record your areas of strength and move on to the next set of questions

 **Action plan**
(see overleaf: page 3 of this guide)


No → If your response to any of the questions is 'no', go to the **NETWORKS GUIDE**

 **9. Networks**

Do we seek out and make the best use of all opportunities for sustained development?

- Do we scan and analyse immediate opportunities, challenges, trends and drivers in the external environment?
- Do we have the right range of income sources for our organisation?
- Are we successful in tendering for public service contracts?
- Do we seek to work with others to increase impact for our beneficiaries or to reduce our costs?

Yes → If you answer 'yes' to all, record your areas of strength, celebrate your success and think about going for a quality award such as the PQASSO Quality Mark

 **Quality awards**
go to the CES website:
www.ces-vol.org.uk to find out more about PQASSO

No → If your response to any of the questions is 'no', go to the **REVITALISE GUIDE**

 **10. Revitalise**