

Your organisation

Issue	Yes or No	Notes and Action Points
Does your organisation have a clear vision, mission and values?		
Does your organisation have a governing document?		
Does your organisation have a strategic plan, plan for the future?		
Does your organisation have the appropriate policies and procedures to ensure it complies with all its legal obligations?		

Your management committee/ Board of Trustees

Issue	Yes or No	Notes and Action Points
Does your organisation have role descriptions for trustees and officers of the management committee?		
Do you consider your management committee to be diverse?		
Does your management committee add value to your organisation?		
Has the management committee ever had any training?		

Your staff and volunteers

Issue	Yes or No	Notes and Action Points
Does your organisation employ staff and/or volunteers?		
Do staff members have job descriptions and terms and conditions of employment?		
Does your organisation have policies and procedures in place to support the staff and/or volunteers?		
Does your management committee properly manage potential risk or conflict of interests?		

Your finances

Issue	Yes or No	Notes and Action Points
Is your organisation fully aware of its current financial situation?		
Does your organisation have effective systems for managing the accounts and recording income and expenditure?		
Does the management committee receive financial statements and reports highlighting the financial situation of the organisation?		
Does your organisation have an independent examiner/ auditor to review the accounts?		
If your organisation is a charity is it complying with the accounting requirements of the Office of the Scottish Charity Regulator		

Accountability to beneficiaries and other stakeholders

Issue	Yes or No	Notes and Action Points
The board is clear who the beneficiaries and users of the organisation are		
The board has identified all other key stakeholders		
The views of all stakeholders are regularly gathered and considered by the board		
The board communicates effectively with all of its stakeholders, through meetings, newsletters, annual reports and so on		
The rights of stakeholders are included in rules, policies and procedures of the organisation		
Users have a real voice in the running of the organisation and are involved in judging the organisation's work		

Your monitoring

Issue	Yes or No	Notes and Action Points
Does your organisation have a structured system for recording information?		
Does your organisation analyse information to monitor the progress of the organisation?		
Does your organisation supply monitoring information to funders		

For Further Information Please Contact:

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