



Toolkit Questionnaire

Forward Planning

A questionnaire that sign posts areas needing development. All the questions here relate to the fact sheets in the Carmarthenshire County Council Community Toolkit. There are no right or wrong answers. If you tick a 'No' box it just highlights an area that may need some work and the fact sheets will point you in the right direction.

It is worth the group completing the question as a whole,

a couple of times a year to ensure that you are all on top of any areas that need developing.

Disclaimer

This Advice Note has been produced on behalf of the Carmarthenshire Community Toolkit to assist community groups to make funding applications. However, it should not be taken as a definitive guide covering all areas of concern and it is recommended that further advice is sought in appropriate circumstances.

1. We have a regularly updated written plan stating what we want to do and when.

Yes No

2. Could you summarise it for new members?

Yes No

3. Everyone understands our up-to-date policies, plans and targets.

Yes No

4. Do your Directors/ Committee members contribute to the plan?

Yes No

5. Could you convince everyone of that?

Yes No

6. Do you keep Policies, plans and targets up-to-date?

Yes No

7. We have clear communication channels between Committee Members, Members/Directors, Management, staff members and customers.

Yes No

8. We all work together to identify problems and implement solutions.

Yes No

9. Do you think that everyone in the organisation would agree with you?

Yes No

10. Everyone understands what is expected of them (roles, procedures and responsibilities).

Yes No

11. Does this include board/ Committee Members/ Part-timers/ Seasonal workers?

Yes No

12. Would your most recent recruit in any of these categories also understand what is expected of them?

Yes No

13. Our Board and Committee Meetings are well chaired, Managed and attended.

Yes No



14. Does this mean that we always have an agenda?

Yes No

15. Does this mean that we always have minutes?

Yes No

16. Does this mean that minutes are approved by the Chair and circulated well in advance of meetings?

Yes No

17. Are decisions recorded as 'truly taken' rather than as we might wish they had been taken?

Yes No

18. Do we stick to decisions?

Yes No

19. Are the actions directed at specific people or teams and time scaled for completion?

Yes No

20. Do all of the above apply to sub-committee meetings too?

Yes No

21. We operate an effective board rotation and re-election policy.

Yes No

22. Do you really operate it?

Yes No

23. Is there a formal gap (say one year) between periods of office or can somebody stand down and be re-elected forever?

Yes No

24. We have the people and succession plans to meet our organisational needs?

Yes No

25. Does it cover more than 12 months into the future?

Yes No

26. Have you any plans for filling the gaps?

Yes No

27. Have you considered advertising for new members?

Yes No

28. Have you considered co-opting instead of having full board/committee members if prospective members are a bit shy of the commitment?

Yes No

29. Are you sure you are not being overly restrictive on eligibility (geographic area or ability or both)?

Yes No

30. Our latest set of annual accounts is available, and lodged where appropriate.

Yes No

31. Could you produce a copy now or by tomorrow?

Yes No

32. Do you display them anywhere publicly?

Yes No



33. We actively manage the training of everyone within the group/organisation?

Yes No

34. Would I find evidence of this policy in the organisations written plan?

Yes No

35. Is there an induction procedure for board/committee members and staff in place?

Yes No

36. We have access to adequate book-keeping skills?

Yes No

37. Have you a long term strategy to maintain such skills in your organisation?

Yes No

38. We have all the organisational skills to support our organisational needs?

Yes No

39. Can you list the main skills?

Yes No

40. Do you actively seek to identify and fill skill gaps?

Yes No

41. Do existing board/committee members receive training and support?

Yes No

42. Have you considered cross/training internally, one to another?

Yes No

43. We have a clear identity (e.g. name, logo.)

Yes No

44. So everyone in the community knows what you are about?

Yes No

45. Do you have a newsletter, notice board, web?

Yes No

46. Do you update information regularly?

Yes No

47. We communicate regularly with our members, funders and the community?

Yes No

48. Do you communicate to all in the same way?

Yes No

49. Do you ask members, funders and the community if they are happy with your communication strategy?

Yes No

50. We regularly monitor member/customer satisfaction.

Yes No

51. Do you make use of the monitoring information?

Yes No

52. Is regular really regular?

Yes No



53. Do you keep Policies, plans and targets up-to-date?

Yes No

54. We produce and use monthly financial figures to manage our activities.

Yes No

55. Is there a broad understanding across the board/committee of what the financial figures mean?

Yes No

56. We know how much income we must achieve to cover our fixed costs.

Yes No

57. Could you tell me what the fixed costs are (even roughly)?

Yes No

58. Do all board/committee members have this broad understanding?

Yes No

59. Would you be able to continue without grants/subsidies?

Yes No

60. We produce realistic budgets for each part of the organisation.

Yes No

61. Does this mean that you know the good bits and bad bits of your organisation then?

Yes No

62. We make best possible use of all assets (e.g. premises, equipment).

Yes No

63. Have you carried out a review recently of anything spare that you no longer use? (and could maybe sell, hire out, swap?)

Yes No

64. There is an effective maintenance programme for all plant and equipment.

Yes No

65. Could you produce a plan/record if I asked for one?

Yes No

66. Do you know if there are any statutory obligations to maintain any plant/equipment?

Yes No

67. We make the best use of technology (e.g. phones, email, computers, internet).

Yes No

68. Do you know if there is anyway that you could use computer software packages such as internet, financial management and desk top publishing to enhance your activities?

Yes No

69. Is this a personal or committee view?

Yes No

70. All our activities are carried out in accordance with appropriate health and safety standards.

Yes No



71. Have you had an external safety audit carried out?

Yes

No

72. Did it reveal any significant issues which are still left unaddressed?

Yes

No