

Think about these questions and give yourself a score from 1 to 10 (1 is not at all satisfied; 10 is very satisfied).

To what extent are you:

1. Satisfied that your charity's purposes and direction are clear and understood

An effective trustee board is clear about purposes, mission and values and uses them to direct all aspects of the charity's activities. If an activity is NOT contributing the achievement of the purposes or is NOT in keeping with the values – should you be doing it?

Score:

2. Satisfied that your stated objects are fit for purpose

Are the charity's objects (purposes) still relevant? Do they match what the charity actually does? Where they are archaic or out of date, you can get them changed. Where the activity no longer matches the purposes – why is that? Mission creep? Or genuine need to modernise?

Score:

3. Satisfied that your processes and procedures are fit for purpose

Trustees can improve their effectiveness (and thus the effectiveness of their charity) by ensuring that the structure, policies and procedures of the charity enable it to achieve its purposes and mission as well as deliver its services efficiently.

Score:

4. Satisfied you have a strong board with the relevant skills

Do you have the right balance of skills and experience? Is the board capable of acting in the best interests of the charity and its beneficiaries? Does each trustee understand their responsibilities and are systems in place to help them be the best trustee they can be? Is the size of the board appropriate?

Score:

5. Satisfied that you are able to learn and improve the efficiency of your charity

Regular reviews of impact and/or customer satisfaction can help improve performance and efficiency (there may be better ways of delivering the charity's purposes). Assessment of performance, and of impact and outcomes, will help planning processes and give trustees the opportunity to think about future direction. This is vital information for trustees and they should make a point of having at least an annual review of this data.

Score:

6. Satisfied that the charity is financially sound

Do you have the financial and other resources needed to deliver your purposes and mission? What contingency planning is in place? If you employ people, how might redundancy costs be met? Do you fund-raise for overheads? Are bids for funds inclusive of a share of rent, rates, light and administrative staff support costs?

Score:

7. Satisfied that fund-raising is efficient?

What is the ratio of overhead to charitable outcome? How much is spent raising each pound donated? Do donors understand why less than 100% of donations is applied directly/tangibly to beneficiaries?

Score:

8. Satisfied that you know what investments the charity has?

Do you keep these under review? A sudden fall or increase in value/income can have a serious impact on the charity. Do you have/need an ethical policy for investments?

Score:

9. Satisfied that the charity is accountable and transparent

Are you preparing appropriate accounts? Is your TAR detailed enough? Is it last years' with this year's numbers added in? Do you have a website? Is it up to date? Do you circulate or publish data? Are minutes of meetings available to trustees? Internal transparency is just as important. Do delegates give you adequate reports? Do you test expenditure? Have you ever seen the bank statements?

Score (internal eg accounts):

Score: (external data eg website):

Overall score:

----- = %
100