



1. Introduction

This form collects data about your organisation. The information you supply will be entered into our database – a comprehensive information source on the third sector and volunteering in the Falkirk Council area. This form is quite straightforward and in some areas it is detailed. This enables us to capture a wide range of information about your organisation which will help members of the public and us at CVS Falkirk access good quality information. Only CVS Falkirk will have access to all of the information you supply. The public will have access to a small amount of the information collected via the online directory on our website. You can choose not to have any information about your organisation in the directory at the end of this form.

Completing the form

It is vital as many questions as possible are answered by the person best able to answer accurately. The minimum information we require are marked with M. We won't be able to use the data you give us if you miss out any of these fields.

Why use this health check?

Getting into the habit of regularly reviewing the health of your organisation will help you to spot problem areas quickly, identify strengths and weaknesses, and encourage you to develop, implement and embed a continuous review process. An organisation with good governance is able to:

- Plan ahead to meet change
- Manage its resources efficiently
- Value its volunteers, staff and board or committee
- Offer quality services and activities to members and users
- Work well with other organisations
- Regularly monitor and evaluate its effectiveness

How the health check will help you

The health check questionnaire is aimed at assisting your organisation get into good shape and be more effective as well as recognise areas requiring support and prioritising. As you go through the form you will be able to:

- Recognise what you already do well
- Identify specific areas/activities that can be improved, updated or developed and build better practice as a result
- Provide a framework to prioritise and manage your organisation's future
- Check what you believe happens against what really happens in practice, and revitalise anything important that's fallen by the wayside
- Identify additional skills, knowledge or training needs of the board or committee, staff and

volunteers

- **Influence our (CVS Falkirk) services.**

1. CVS Falkirk Team Member



2. Section 1 - Organisation

* 1. Organisation Name

* 2. Organisation Type

- Organisation Branch/Subsidiary Partnership/Network/Forum

3. Website Address

4. Social Media

5. Do you have a newsletter or e-bulletin?

* 6. What is the legal status of your organisation?

- Scottish Registered Charity
 Unincorporated Association
 Company Limited by Guarantee
 Scottish Charitable Incorporated Organisation (SCIO)
 Trust
 Industrial Provident Society
 Community Interest Company (CIC)
 Not known/Other (please specify)

7. If your organisation is a registered charity, what is your charity number?

*** 8. Correspondence/Head Office/Main Contact**

Contact name

Address Line 1

Address Line 2

Address Line 3 (local neighbourhood)

Town

Postcode

Phone number

Mobile number

Email

Is this a home address and telephone number (Y/N)

Can this person's details be published on the web as the main contact for this organisation? (Y/N)

9. Preferred method of contact

Phone Mobile Email Post

10. Service Delivery Venue (1)

Address Line 1

Address Line 2

Address Line 3 (local neighbourhood)

Town

Postcode

Phone number

Mobile number

Email

Is this a home address and telephone number (Y/N)

11. Service Delivery Venue (2)

Address Line 1

Address Line 2

Address Line 3 (local
neighbourhood)

Town

Postcode

Phone number

Mobile number

Email

Is this a home address
and telephone number
(Y/N)



3. Accessibility

1. Do you have disabled access at the premises?

Yes No

2. Do you have dedicated accessible parking spaces at the premises?

Yes No

3. Do you have dedicated accessible toilets at the premises?

Yes No

4. Are there any other accessibility provisions at this location?

5. Please tell us when your services operate

	Start time	Finish time	Start Time	Finish Time	Start Time	Finish Time
Monday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tuesday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wednesday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Friday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sunday	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other times (please specify)

6. When does your service operate?

Weekly Monthly

Other (please specify)



4. Geography

* 1. In which geographical area do you operate?

- International
- UK wide
- Scotland wide
- Falkirk
- Forth Valley (Falkirk, Stirling, Clackmannanshire)
- More than 1 Local Authority Area (please specify)

Please specify areas you work in

* 2. Which local neighbourhoods do you serve?

- | | | |
|---|---------------------------------------|--|
| <input type="checkbox"/> Airth | <input type="checkbox"/> Dunipace | <input type="checkbox"/> New Carron |
| <input type="checkbox"/> Allandale | <input type="checkbox"/> Dunmore | <input type="checkbox"/> Polmont |
| <input type="checkbox"/> Avonbridge | <input type="checkbox"/> Falkirk | <input type="checkbox"/> Redding |
| <input type="checkbox"/> Bainsford | <input type="checkbox"/> Fankerton | <input type="checkbox"/> Reddingmuirhead |
| <input type="checkbox"/> Banknock | <input type="checkbox"/> Glen Village | <input type="checkbox"/> Rumford |
| <input type="checkbox"/> Blackness | <input type="checkbox"/> Grahamston | <input type="checkbox"/> Shieldhill |
| <input type="checkbox"/> Bo'ness | <input type="checkbox"/> Grangemouth | <input type="checkbox"/> Skinflats |
| <input type="checkbox"/> Bonnybridge | <input type="checkbox"/> Greenhill | <input type="checkbox"/> Slamannan |
| <input type="checkbox"/> Bothkennar | <input type="checkbox"/> Hags | <input type="checkbox"/> Standburn |
| <input type="checkbox"/> Bowhouse | <input type="checkbox"/> Hallglen | <input type="checkbox"/> Stenhousemuir |
| <input type="checkbox"/> Brightons | <input type="checkbox"/> Kersiebank | <input type="checkbox"/> Stoneywood |
| <input type="checkbox"/> Brockville | <input type="checkbox"/> Langlees | <input type="checkbox"/> Tamfourhill |
| <input type="checkbox"/> California | <input type="checkbox"/> Larbert | <input type="checkbox"/> Torwood |
| <input type="checkbox"/> Camelon | <input type="checkbox"/> Laurieston | <input type="checkbox"/> Wallacestone |
| <input type="checkbox"/> Carron | <input type="checkbox"/> Letham | <input type="checkbox"/> Westfield |
| <input type="checkbox"/> Carronshore | <input type="checkbox"/> Limerigg | <input type="checkbox"/> Westquarter |
| <input type="checkbox"/> Castlecary | <input type="checkbox"/> Longcroft | <input type="checkbox"/> Whitecross |
| <input type="checkbox"/> Denny | <input type="checkbox"/> Maddiston | |
| <input type="checkbox"/> Dennyloanhead | <input type="checkbox"/> Middlefield | |
| <input type="checkbox"/> Other (please specify) | | |

* 3. Which local neighbourhoods do you serve?

- | | | |
|---|---------------------------------------|--|
| <input type="checkbox"/> Airth | <input type="checkbox"/> Dunipace | <input type="checkbox"/> New Carron |
| <input type="checkbox"/> Allandale | <input type="checkbox"/> Dunmore | <input type="checkbox"/> Polmont |
| <input type="checkbox"/> Avonbridge | <input type="checkbox"/> Falkirk | <input type="checkbox"/> Redding |
| <input type="checkbox"/> Bainsford | <input type="checkbox"/> Fankerton | <input type="checkbox"/> Reddingmuirhead |
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| <input type="checkbox"/> Denny | <input type="checkbox"/> Maddiston | |
| <input type="checkbox"/> Dennyloanhead | <input type="checkbox"/> Middlefield | |
| <input type="checkbox"/> Other (please specify) | | |



5. Activity of Organisation

1. Please provide a brief statement about your organisation's main aims and objectives (e.g. a mission statement), as you would like others to read about you. This should be no longer than 150 words.

2. What are your organisation's main areas of activity?*(please select up to 3)*

- | | | |
|--|---|---|
| <input type="checkbox"/> Addictions | <input type="checkbox"/> Credit Union/Community Banking | <input type="checkbox"/> Offenders/Ex-Offenders |
| <input type="checkbox"/> Advice/Information | <input type="checkbox"/> Drug/Alcohol Issues | <input type="checkbox"/> Older People |
| <input type="checkbox"/> Advocacy | <input type="checkbox"/> Education/Learning/Training | <input type="checkbox"/> Overseas Aid/Developing World |
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Emergency Response/Disaster Relief | <input type="checkbox"/> Physical Disability |
| <input type="checkbox"/> Arts and Culture | <input type="checkbox"/> Employment | <input type="checkbox"/> Poverty |
| <input type="checkbox"/> Befriending/Mentoring | <input type="checkbox"/> Environment/Recycling | <input type="checkbox"/> Refugees/Asylum Seekers |
| <input type="checkbox"/> Black/Ethnic Minority | <input type="checkbox"/> Equality | <input type="checkbox"/> Self Help/Support |
| <input type="checkbox"/> Campaigning/Lobbying | <input type="checkbox"/> Faith/Religion/Belief | <input type="checkbox"/> Sensory Impairment |
| <input type="checkbox"/> Carers | <input type="checkbox"/> Family Support | <input type="checkbox"/> Sexuality |
| <input type="checkbox"/> Charity Shop | <input type="checkbox"/> Fundraising/Funding | <input type="checkbox"/> Single Parent |
| <input type="checkbox"/> Childrens' Services | <input type="checkbox"/> Health | <input type="checkbox"/> Social Care |
| <input type="checkbox"/> Community Council | <input type="checkbox"/> Helpline | <input type="checkbox"/> Social Economy/Social Enterprise |
| <input type="checkbox"/> Community Development | <input type="checkbox"/> Housing/Homelessness | <input type="checkbox"/> Sport/Leisure/Recreation |
| <input type="checkbox"/> Community Facilities | <input type="checkbox"/> Housing Association | <input type="checkbox"/> Volunteering |
| <input type="checkbox"/> Community Forum | <input type="checkbox"/> Law and Justice | <input type="checkbox"/> Women |
| <input type="checkbox"/> Community Safety | <input type="checkbox"/> Learning Disability | <input type="checkbox"/> Young People |
| <input type="checkbox"/> Community Transport | <input type="checkbox"/> Men | |
| <input type="checkbox"/> Counselling | <input type="checkbox"/> Mental Health | |



6. Board and Committee

As part of this process, please provide us a signed copy of your governing documents, for example Set of Rules; Constitution; Memorandum; Articles of Association.

1. Which documents are you providing us with?

2. When did you last review these documents?

Date / Time

3. Are you a membership organisation?

Yes No

4. Do you have a register of members?

Yes No N/A

5. Do you have a published application process for new members?

Yes (*please provide a copy*) No

6. How often does your board or committee meet?

- Monthly
 Bi-monthly
 Quarterly
 Twice a year
 Annually

7. When was your last AGM?

Date

8. When were your financial returns last filed?

Date

DD/MM/YYYY

9. Who did you make this return to? (i.e. Companies House; OSCR; Office of CIC Regulator, etc.)

10. Do you have elected officers?

Yes No

11. Are they clear in their roles as an elected officer/director?

Yes No

12. What is the recruitment process for elected officers/directors?

13. Do you have a published strategy?

Yes *(please specify in comments box where it is published)*

No

Where is strategy published?

14. Do your staff and volunteers know what it says?

Yes No

15. Have you considered succession planning?

Yes No

16. What quality standards have you achieved/or working towards?

17. Does the board or committee have a policy (such as a codes of conduct) to deal with conflicts of interest within the board?

Yes *(please provide a copy)* No

18. Do you have a risk management register?

Yes No

19. What are your key priorities in the current year?



7. Finance

1. Does your organisation have its own bank account?

Yes No

2. Does the account require dual signatories, who are unrelated?

Yes No

3. What percentage of the organisation's income is earned through trading?

4. What types of fundraising does the organisation undertake?

5. Do you have a funding strategy?

Yes No

6. Do you have a fundraising officer?

Yes No

7. Do you have a treasurer?

Yes No

8. What was the date of your last audited or independently examined accounts?

Date / Time

DD/MM/YYYY

9. To which regulators are you required to submit your accounts?



8. Operational

1. Which bodies are your registered with? (e.g. CQC)

2. Are you registered with the Information Commissioner under the Data Protection Act so that you are on the DPP Register?

Yes No

3. Please list the policies your organisation has

4. How often are your policies reviewed?

5. Do you publish an annual impact report?

Yes No

6. Do you have agreements in place for partnership working and/or trading? (e.g. Memorandum of Understanding)

Yes No

7. Are you running specific projects?

Yes No

8. Do you use co-production for design and service delivery?

Yes No



9. Trading

1. Do you have a business plan?

Yes No

2. Do you have contracts with the public sector?

Yes No

3. How do you generate income/trading (contract purchase)?

4. Are you registered with Public Contracts Scotland?

Yes No

5. Have you completed a European Single Procurement Document (ESPD)?

Yes No

6. Are you VAT registered?

Yes No

7. Do you have a marketing plan?

Yes No



10. Employees

1. Do you have an organisation chart?

Yes (*please provide a copy*) No

2. Do you employ staff?

Yes No (*please go to question 8 on this page*)

3. How many paid staff do you have?

4. Do you have a recruitment and induction process?

Yes No

5. Do you have an equality and diversity process?

Yes No

6. Do you have contracts of employment for all staff?

Yes No

7. Do you have a job description for each staff member?

Yes No

8. Do you provide an induction process for staff, volunteers and board members?

Yes (*please specify*) No

Please specify

9. Are your organisation's policies built into the induction process for staff, volunteers and board members?

Yes No

10. Do you provide formal and documented support and supervision sessions for each staff member?

Yes No

11. Are you an accredited living wage employer?

Yes No

12. Are all eligible staff enrolled in a pension scheme?

Yes No

13. Do you provide opportunities for training and personal development for staff?

Yes No

14. Do you participate in employer supported volunteering?

Yes No



11. Volunteering

1. Do you have a volunteer policy?

Yes (*please provide a copy*) No

2. Do you engage/involve volunteers?

Yes No

3. How many volunteers are involved in your organisation, including board members?

4. Have you got funding for your volunteer programme?

Yes No

5. Is volunteering activity covered within your insurance?

Yes No

6. Do you have a Volunteer Manager/Co-ordinator?

Yes No

7. Does each volunteering role have a clear role descriptor?

Yes No

8. Do you carry out a risk assessment for each role?

Yes No

9. Do you provide formal and documented support and supervision sessions for each volunteer?

Yes No

10. Have you achieved the Volunteer Friendly Award or Investors in Volunteers Awards?

Yes (*please specify*) No

Please specify

11. Do you offer Saltire Awards to young volunteers?

Yes No

12. Do you offer your own volunteer awards ceremony?

Yes No



12. Participating and Influencing

1. Are you aware of the Community Planning process in Falkirk?

Yes No

2. Do you know about the Strategic Outcomes & Local Delivery (SOLD) Plan?

Yes No

3. Do you know about the third sector forums that CVS Falkirk facilitate?

Yes No

4. Have you attended any of the forums?

Yes No

(please specify)

5. Do you know about the Online Discussion Boards?

Yes No

6. Have you participated in any of the Online Discussion Boards?

Yes No

(please specify)

7. Would you like to be involved in ensuring third sector views and issues and included in community planning in Falkirk?

Yes No



13.

* 1. We would like to send you our weekly e-bulletin that provides information about local events, funding opportunities, consultation requests etc.

- Yes, I would like to receive the e-bulletin (please provide email below)
- No, thank you
- I already receive the e-bulletin

Email:

2. Help us make a difference to the quality of life of our communities. By joining our membership, your organisation will contribute to the collective voice of the local third sector and give CVS Falkirk the authority in its partnership work with other agencies.

Member organisations are:

- Eligible to nominate someone from their organisation to serve on our Board of Directors
- Eligible to attend and vote at our annual general meeting (AGM)

In order to develop the work that we do, we cannot consider membership to our organisation without a signature and a signed copy of your Constitution/Memorandum and Articles of Association.

*should CVS Falkirk be wound up whilst our organisation is a member or within one year of ceasing to be a member, we agree to contribute a maximum of £1 (one pound) to the company's assets.

3. Is there anything identified in completing this Health Check that you would like our help with?



14. Completion and Consent

CVS Falkirk would like to thank you for contributing; your participation is greatly appreciated and will help to inform accurate research on the vital local and national contribution of Falkirk's third sector.

Note on Personal Data

Any personal information you give us (e.g. the name, personal email or home address of a main contact) will be held and used in accordance with the Data Protection Act 1998. Personal information held will not be disclosed to any unauthorised person or body without your permission.

Only CVS Falkirk personnel will have access to all of the information you supply.

General organisational information will be made available to other organisations and the public through approved local and national websites (such as www.volunteerscotland.net). We will not display personal contact names or information unless you give us permission to do so. You have the right to see what data we store about you, how we use it and to prevent us from using it, by request.

Anonymised statistical data gathered from our database may be used to report to our various funders and policy makers at a local or national level and in activity such as our Service Directory or Annual Impact Report.

If you have any queries or concerns regarding the Data Protection Act and this Statement then please write to: Chief Executive Officer, CVS Falkirk, Unit 6, The Courtyard, Callendar Business Park, Callendar Road, Falkirk, FK1 1XR, or by e-mail: info@cvsfalkirk.org.uk

* 1. By signing below, I agree that I have the requisite authority to provide this information on behalf of the organisation mentioned herein.

Participant's Signature

Participant's Name

Role

Date