

Name of Worker

Name of Group

Position

Development Worker

Name of Development Worker's Group

Contact Details (phone / email)

Signposting - to sources of information that may be useful to the development of your group

For help with...

Name of organisation

Contact Details

Referral 1 - details of appointment made

To: Name

Group

Reason

Date

Details - including arranged meetings / times / venues / addresses

Referral 2 - details of appointment made

To: Name

Group

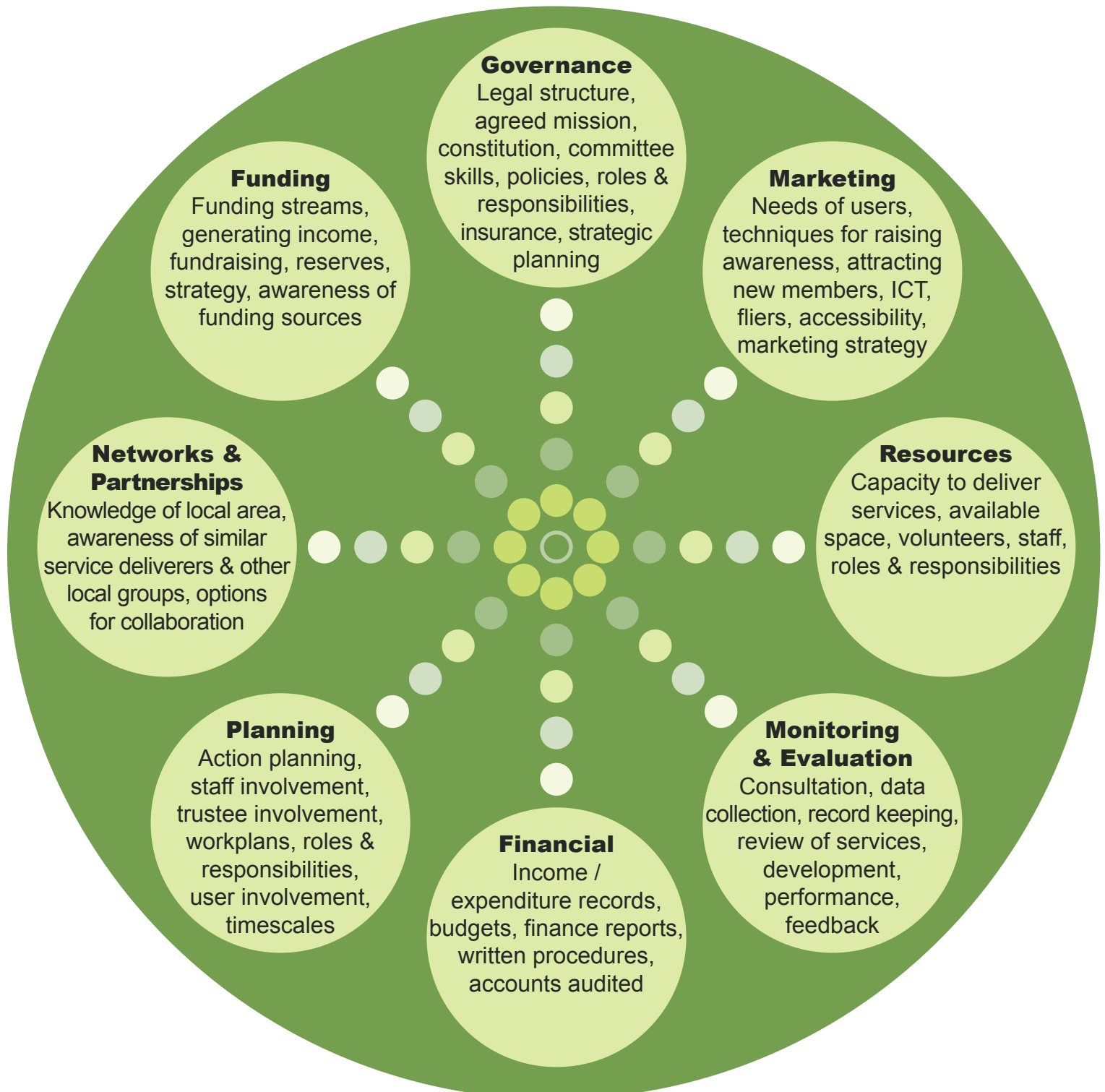
Reason

Date

Details - including arranged meetings / times / venues / addresses

I agree for this information to be shared across the membership of InformLeeds Network

Name of Worker	Name of Group	Position
Development Worker	Name of Development Worker's Group	Contact Details (phone / email)



Interpretation of the Stages

Use this table as a guide when deciding on the health of the organisation under the headings provided.












Governance

Marketing

 Strategic direction functional, compliance in order, equality and diversity addressed.	 Organisation uses a variety of opportunities to convey its key messages in a consistent style.
 All relevant policies and procedures and insurance in place and implemented.	 Understanding of how to create targeted materials for appropriate audiences.
 Functional Committee / Board trained in roles and responsibilities, active at influencing strategic direction.	 Successful marketing attempts considering product, price, placement and promotion.
 Legal form with governing document.	 Production of materials and awareness of promoting services as value for money to right audience.
 Vision / values / mission / objects.	 Production of some leaflets about services and understanding of who to market to and how.
 No legal form.	 No marketing.
























Resources

Monitoring and Evaluation

 Fully operational, with staff, policies, accommodation and service delivery / activity.	 All stakeholders engaged in monitoring and evaluation of services.
 Staff and volunteers in place along with a complete raft of policies and procedures.	 Monitoring data of outcomes and outputs used to plan service delivery.
 Volunteers identified to deliver services, some policies in place.	 Organisation conducts evaluations and monitors outputs and some outcomes.
 Accommodation and venues available for planned activities and developing policies.	 Feedback is collected and used to inform service delivery.
 Activities planned or taking place.	 Some collection of outputs.
 Nothing.	 No Monitoring and Evaluation in place at all.

Interpretation of the Stages

Use this table as a guide when deciding on the health of the organisation under the headings provided.

Financial	Planning
 All four key elements are fully in place: Approved budget, regular finance reports, clear procedures, up to date record keeping.	 3-5 year business/strategic plan in place. Stakeholder involvement. Operational plans clearly identifying roles.
 All four key elements are in place but with minor gaps.	 Business plan in place but not actively used. Inadequate stakeholders involvement.
 All four key elements are in place but with serious gaps. Eg. Budget not approved or records not checked against bank statements.	 Some structured planning for or specific project planning. Use of year planners or Gantt charts.
 Budget in place, structured record keeping, procedures being adhered to.	 Thinking further ahead, but not formalised or thorough.
 Basic budget, starting to keep records of purchases, keeping receipts.	 Day to day planning only. Use of diaries.
 No budget, no finance reports, no record keeping, no financial procedures (four key elements.)	 No planning
Networks & Partnerships	Funding
 Strategic representation / presence. Valid experience of formalised partnership working.	 Significant funding secured / generates income to sustain current activities, cover core costs and has reserves; strategic programme in place. Knowledge of funders & support.
 Attended representative training and present at some strategic meetings. Good knowledge and some experience of partnership working.	 Some funding in place. Awareness of funding bodies and available support. Fundraising strategy started, full cost recovery implemented and has begun to build up reserves.
 Members of some networks but not active. Some experience of successful joint working.	 Small funding secured. Training/advice to develop fundraising strategy. Delivery of some income generating activities. No reserves.
 Some experience of working with other organisations in a referral / signposting capacity Knowledge of networks but apprehensive.	 Secured first grant/funding to deliver some activities. Potential funders and income generating activities identified. Fundraising training attended. No reserves.
 Some awareness and contact made with local relevant organisations doing work in a similar field.	 Some awareness of funding and support available. Submitted funding bids unsuccessfully. Delivery of some income generating activities with poor results.
 Working in isolation. No experience of partnership work.	 No income. No awareness of funding support, service delivery or reserves.

Issues Discussed

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Action Points

By whom

By when

Action Points	By whom	By when

Date and Place of Next Meeting with Development Worker (if applicable):

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