

# Tools Matrix

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<b>Quick face-to-face health check tools used by development workers (completed in a single session of up to two hours)</b>						
<p>Black Training and Enterprise Group (BTEG)</p> <p>2nd Floor Lancaster House 31-33 Islington High Street London N1 9LH 020 7843 6110</p> <p><a href="mailto:info@bteg.co.uk">info@bteg.co.uk</a></p> <p><a href="http://www.bteg.co.uk">www.bteg.co.uk</a></p> <p>Tebussum Rashid Head of Organisation Development</p> <p><a href="mailto:Tebussum@bteg.co.uk">Tebussum@bteg.co.uk</a></p> <p>020 7843 6125</p>	Baseline Check	Started using the tool in 2004	<p>The tool is used primarily by the Head of Organisational Development but has also been used by other staff on specific project to support organisational development.</p> <p>The tool has been shared with development workers on a BASSAC/IVAR capacity builders course in 2007.</p> <p>The tool has been used with:</p> <ul style="list-style-type: none"> <li>● 50 organisations in a Big Lottery funded programme in London</li> <li>● 20 organisations in three English regions (East Midlands, East of England and London)</li> <li>● 12 Race Equality councils around the country</li> <li>● with a number of employment training providers</li> <li>● occasionally with groups as part of business planning and fundraising strategy development.</li> </ul> <p>It is currently being used with 12 organisations in a City Bridge Trust funded organisational development programme.</p>	<p>About an hour to complete the check.</p> <p>Q.9 is a tick box matrix which can be completed as a stand-alone exercise in under 15 minutes.</p>	<p>The check is not publicly available. A check is carried out with all groups supported through organisational initiatives to gather baseline details.</p> <p>A word version can be obtained by request for any development workers wishing to see the tool.</p>	<p>The tool includes two sections. Section A collects profile information about the organisation – type of organisation, client groups, aims and main activities. Section B is divided into six areas:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Monitoring and evaluation</li> <li>● Networking and partnership</li> <li>● Marketing</li> <li>● ICT</li> <li>● Staff and volunteers.</li> </ul> <p>The format is a combination of yes/no and other tick boxes combined with some questions collecting more qualitative answers.</p> <p>Question 9 can be used as a stand-alone 'quick check' providing a matrix ratings scale. Organisations are asked to score themselves against 23 organisational issues indicating on a scale of 1-7 whether particular issues are of concern to them or not. Issues include:</p> <ul style="list-style-type: none"> <li>● Funding – having enough funds to survive</li> <li>● Funding – having a funding plan</li> <li>● Staffing – supervision, managing staff performance</li> </ul>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
						<ul style="list-style-type: none"> <li>● Staffing – recruitment</li> <li>● Monitoring – having techniques to measure quantitative and qualitative changes and performance</li> <li>● Monitoring – being clear about targets</li> <li>● Performance – meeting the requirements of funders/regulators</li> <li>● Performance – having clear strategic plans</li> <li>● ICT – ability to use IT effectively</li> <li>● Working in partnership</li> <li>● Assessing risks</li> <li>● Promoting diversity.</li> </ul>
<p>Community and Voluntary Partners, Bolsover District (CVP)</p> <p>Room 13 Shirebrook Community Education Centre Langwith Road Shirebrook Mansfield Nottinghamshire NG20 8TF 01623 747147</p> <p><a href="http://www.bolsovercen.org.uk">www.bolsovercen.org.uk</a></p> <p>Jon O'Neil, Community Development Worker</p> <p><a href="mailto:jon@bolsovercen.org.uk">jon@bolsovercen.org.uk</a></p>	<p>Group / Organisational Health Check</p>	<p>December 2007</p>	<p>The tool is being used with about 35-40 voluntary and community groups per year in the Bolsover district of Derbyshire. The largest employs 100 people but they are mostly small voluntary run groups.</p>	<p>From a few minutes to an hour depending on whether it is a new or more established group.</p>	<p>A hard copy version is usually used with groups but a copy can be downloaded from their website.</p>	<p>The tool is divided into seven sections:</p> <ul style="list-style-type: none"> <li>● Organisational status</li> <li>● Policies and Procedures</li> <li>● Strategic direction</li> <li>● Human resources</li> <li>● Publicity and marketing</li> <li>● Funding</li> <li>● Monitoring and evaluation.</li> </ul> <p>The tool combines yes/no responses, profile gathering questions and tick-box responses about documents/policies in place with questions about where they are and when they were last updated.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<p>Congleton District Voluntary Action (CDVA) 11 Hope Street Sandbach CW11 1BA 01270 763100 <a href="http://www.cdva.org.uk">www.cdva.org.uk</a></p> <p>Lynn Purcell Funding and Development Advisor <a href="mailto:lynn.purcell@cdva.org.uk">lynn.purcell@cdva.org.uk</a></p>	Health Check	<p>2007</p> <p>The tool was first used in 2008 and was revised in March 2009.</p>	Used by the Funding and Development Advisor with a variety of groups in the Borough of Warrington. Health check carried out with eight groups since started in 2008.	1-2 hours	The health check is not publicly available. The development worker may carry out a health check once an organisation has made contact.	<p>The tool is divided into five sections:</p> <ul style="list-style-type: none"> <li>● Organisational governance and management</li> <li>● Finance</li> <li>● Human resources: staff &amp; volunteers</li> <li>● Equal opportunities</li> <li>● Health and safety.</li> </ul> <p>The format is a Yes/No tick-box approach with suggestions for evidence and a comments/action box.</p> <p>The tool had its origins in a youth organisations quality tool developed by Warrington CVS and the Cheshire Youth Federation. The health check developed from the tool (and used by Warrington CVS) has been recently revised by Congleton DVA. It continues to have a strong focus on procedures and safety issues.</p>
<p>Council for Voluntary Service Rochdale (CVSR) Partnership House Sparrow Hill Rochdale OL16 1QT 01706 631291 <a href="http://www.cvsr.org.uk">www.cvsr.org.uk</a></p> <p>Michelle Ling <a href="mailto:m.ling@cvsr.org.uk">m.ling@cvsr.org.uk</a></p>	CVSR Service Needs Assessment	2007	The tool is used by all 12 development officers in CVSR as a preliminary to all development work, currently carried out with over 200 organisations per year. The tool indicates the areas for development work and serves as an initial assessment for organisations proceeding with PQASSO.	About ten minutes	Not publicly available, but the assessment is carried out routinely with all groups accessing CVSR.	<p>The tool is based on PQASSO 2nd edition suggested evidence, and is divided into eight areas:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Management</li> <li>● Staff and volunteers</li> <li>● Training and development</li> <li>● Managing money</li> <li>● Managing activities</li> <li>● Networking and partnership</li> <li>● Monitoring and evaluation.</li> </ul>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
						The tool gives a short explanation of each area, then provides a yes/no/don't know/n/a tick-box format.
<p>Dudley Community and Voluntary Service</p> <p>Kate Green 01384 573381</p> <p><a href="mailto:buildingblocks@dudleycvs.org.uk">buildingblocks@dudleycvs.org.uk</a></p> <p>Copyright is held by the consultants who developed the main part of the tool.</p>	Building Blocks VCS Good Practice Toolkit	Completed in March 2009	<p>The toolkit is used by development workers with medium to large-sized organisations, to help them demonstrate that they are 'fit for purpose'. The toolkit is part of a five-year Lottery funded project.</p> <p>Work has just started supporting VCOs with the toolkit. The project is targeting support to 24 VCOs per year, and eight VCOs are currently signed up to receive support.</p>	This depends on the group, but it is an evidence-based system and it may take a group one year to be awarded with a certificate.	This is a tool to be used only with intensive support from Dudley CVS. Dudley CVS is in discussions about the possibility of selling the toolkit to other infrastructure organisations.	<p>The toolkit has an introduction and a health check on each of ten sections: governance; business planning; human resources; promotion and marketing; money matters; tendering; policies and procedures; performance management; partnerships and networking.</p> <p>Appendices contain information more relevant to local VCOs, including local commissioning procedures, local strategies, local contacts.</p> <p>The toolkit also contains a USB stick containing sample policies and procedures.</p>
<p>Eastbourne Association of Voluntary Services (EAVS)</p> <p>8 Saffrons Road Eastbourne BN21 1DG 01323 639373</p> <p><a href="http://www.eavs.org.uk">www.eavs.org.uk</a></p> <p>Marie Tomblin 01323 419788</p> <p><a href="mailto:marie@eaves.org.uk">marie@eaves.org.uk</a></p>	Organisational Checklist for Voluntary and Community Groups	Spring 2008	<p>The tool is used by EAVS development workers with voluntary and community groups in Eastbourne and Wealden. They work predominantly with small community groups with little turnover and small committees.</p> <p>The tool has been used with approximately 30 groups.</p>	20 minutes – 1 hour	<p>The checklist is not available publicly. A hard copy is completed with groups.</p> <p>For development workers interested a copy can be requested from EAVS.</p>	<p>The tool contains a very short checklist, divided into four areas:</p> <ul style="list-style-type: none"> <li>● About your group, including aims and objectives, governance, budget</li> <li>● About policies and procedures</li> <li>● About funding</li> <li>● About networking and training.</li> </ul> <p>The tool comprises a Yes/No tick-box format with action point comment box.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<p>Gloucestershire Association for Voluntary and Community Action (GAVCA)</p> <p>75-81 Eastgate Street Gloucester GL1 1PN 01452 332424</p> <p><a href="http://www.gavca.org.uk">www.gavca.org.uk</a></p> <p>Camilla Hale 01452 332424</p> <p><a href="mailto:camillah@gavca.org.uk">camillah@gavca.org.uk</a></p>	<p>Outcomes Star Chart for Organisational Capacity Building</p>	<p>January 2007</p>	<p>The star is being used with groups in Cheltenham and Gloucester by the two development workers based at Gloucestershire Association for Voluntary and Community Action and Cheltenham Voluntary and Community Action.</p> <p>It has been used with one or two staff/trustees but also with larger groups of members.</p> <p>The tool has been used with ten groups in 2008, some six per cent of the total number of groups with which GAVCA worked.</p>	<p>15 minutes to 2 hours depending on the number of people completing the star.</p>	<p>Not publicly available. A hard copy is completed by groups. GAVCA is willing to share the tool with other infrastructure organisations on request.</p>	<p>The spokes of the wheel/star cover the following areas:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Financial management</li> <li>● Strategic planning</li> <li>● User involvement</li> <li>● Communication (internal)</li> <li>● Marketing and promotion (external)</li> <li>● Equal opportunities</li> <li>● Human resources</li> <li>● Volunteer management</li> <li>● Effective use of resources</li> <li>● Training and learning</li> <li>● Doing what we do.</li> </ul>
<p>Halton Voluntary Action</p> <p>Sefton House Public Hall Street Runcorn WA7 1NG 01928 592405</p> <p><a href="http://www.haltonva.org.uk">www.haltonva.org.uk</a></p> <p>Andy Guile</p> <p><a href="mailto:aguile@haltonva.org.uk">aguile@haltonva.org.uk</a></p>	<p>DeveloP-IT</p>	<p>2006</p>	<p>The tool is being used across the Greater Merseyside ChangeUp Consortium. Halton Voluntary Action has used it with 30 or 40 organisations, targeting smaller groups not tendering for contracts.</p>	<p>Approx. 2 hours. It may be carried out in more than one session.</p>	<p>The toolkit is currently accessible to greater Merseyside development workers only in hard copy.</p> <p>There are plans to develop an online version and possibly to make it available on licence to other infrastructure organisations.</p>	<p>The tool does not aim to cover everything an organisation needs to be doing to be effective but to provide a starting point. It is designed to be complementary to PQASSO and Quality First which give more in depth approaches.</p> <p>The tool is divided into four seasons to relate to the organisation's stage of development. The tool also contains a spider diagram against which progress can be plotted.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<p>Islington Voluntary Action Council (IVAC)</p> <p>322 Upper Street London N1 2XQ 020 7226 4862</p> <p><a href="http://www.ivac.org.uk">www.ivac.org.uk</a></p> <p>Yvette Ellis 020 7354 6367</p> <p><a href="mailto:yvetteellis@ivac.org.uk">yvetteellis@ivac.org.uk</a></p>	Contact Sheet and Initial Assessment Form	January 2009	<p>The tool is used with small to medium voluntary and community groups, many from disadvantaged groups in the London Borough of Islington.</p> <p>This new tool has been used with six organisations in its first three months of use.</p>	45 minutes	<p>Not publicly available. This tool is used with groups contacting IVAC.</p> <p>The tool can be made available to other organisations on request.</p>	<p>The tool is divided into 12 areas:</p> <ul style="list-style-type: none"> <li>● Legal structure</li> <li>● Governance</li> <li>● Policies and procedures</li> <li>● Insurance</li> <li>● Communications</li> <li>● Finance systems</li> <li>● Fundraising</li> <li>● Personnel</li> <li>● Volunteers</li> <li>● Quality assurance</li> <li>● Consultation</li> <li>● Networks and partnerships.</li> </ul> <p>Yes/No tick box format with space for comments and actions.</p>
<p>Warrington CVS</p> <p>The GATEWAY 89 Sankey Street Warrington WA1 1SR 01925 246880</p> <p><a href="mailto:cvsr@thegateway.org.uk">cvsr@thegateway.org.uk</a></p> <p>Gwen Lightfoot Development Officer (children and young people)</p> <p><a href="mailto:gwenl@thegateway.org.uk">gwenl@thegateway.org.uk</a></p>	Health Check	2007 First used 2008	The Development Officer has used the health check with some 6 to 7 groups to date. Checks are carried out as part of the CRB project.	Approx 2 hours	<p>Not publicly available. Groups applying for free support under the CRB project will first receive a health check.</p>	<p>The tool is divided into five areas:</p> <ul style="list-style-type: none"> <li>● Organisational Governance and management</li> <li>● Finance</li> <li>● Human resources: staff and volunteers</li> <li>● Equal opportunities</li> <li>● Health and safety.</li> </ul> <p>Each section is introduced by a statement of good practice. Evidence is required against each of the questions and there is a comments box for notes as well as tick boxes for action by CVS and/or group.</p> <p>The tool had its origins in a youth</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
						federation. It retains a strong focus on procedures and safety/safeguarding issues.
Warwickshire Community and Voluntary Action  Rugby Office 19 & 20 North Street Rugby CV21 2AG 01788 574258 <a href="http://www.rugbycvs.org.uk">www.rugbycvs.org.uk</a>  Clare Montague Locality Manager <a href="mailto:clare@rugbycvs.org.uk">clare@rugbycvs.org.uk</a>	Organisational health check	2007	The tool is used with small and medium sized voluntary and community groups in Rugby.	Information unavailable	Information unavailable	The tool is a short questionnaire, with three questions in each of following areas: <ul style="list-style-type: none"> <li>● Funding</li> <li>● Strategic planning</li> <li>● Governance</li> <li>● Quality</li> <li>● Volunteering.</li> </ul> It uses a traffic light system for scoring against each of the questions with red highlighting areas for action.
<b>In-depth health check tools used by development workers – most divided into a number of specific areas which can be used as single issue health checks</b>						
Croydon Voluntary Action  97 High Street Thornton Heath CR7 8RY Tel: 020 8684 3862  Bhupendra Solanki, CVA Capacity Building Manager 020 8683 5916 <a href="mailto:Bhupendra.Solanki@cvalive.org.uk">Bhupendra.Solanki@cvalive.org.uk</a>	Croydon Capacity Building Toolkit	2004	The tool had its origins in the Croydon Quality Assurance Group, including Croydon Voluntary Action, the BME Forum, Croydon Asian Resource Centre and Croydon Council.  Its use has been limited by lack of funding for capacity building. The CVA Capacity Building Officer is currently rolling it out to organisations working with children and young people, targeting some 20 groups. The BME Forum is using it with mental health organisations as part of Capacity Builders funded work.	Whole process takes about 3.5 days, including follow up.	The check is essentially carried out with a development worker as part of capacity building.  CVA is planning to sell the tool under license. Meanwhile the tool may be accessed by other infrastructure organisations on application.	The Toolkit covers the following good practice areas: <ul style="list-style-type: none"> <li>● Governance and leadership</li> <li>● Business Planning</li> <li>● Managing People</li> <li>● Financial Management</li> <li>● Partnership Working</li> <li>● Monitoring and development and improvement.</li> </ul> Each area has up to 20 prescriptive statements, with space for comments and action required.

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<p>Staffordshire and Stoke on Trent Consortium of Voluntary Sector Organisations (SCIO)</p> <p><a href="http://www.c2g.org.uk/c2g/">http://www.c2g.org.uk/c2g/</a></p> <p>Victoria Smith SCIO Performance Manager 01785 279936 <a href="mailto:sciopdmys@sdvs.org.uk">sciopdmys@sdvs.org.uk</a></p> <p>SCIO Chair <a href="mailto:jones.gary@talk21.com">jones.gary@talk21.com</a></p>	Health check	<p>2007/08</p> <p>Development workers started using the tool in April 2008.</p>	<p>Thirteen infrastructure organisations across Staffordshire have committed to using this tool.</p> <p>The tool can be used with new groups, more established groups wishing to grow and charities and companies limited by guarantee.</p> <p>Around 396 health checks are targeted to be completed in 2008 and 2009 for community and voluntary organisations in Staffordshire.</p>	<p>Each check takes about two hours to complete. Action plans produced are then worked through over a period of six months.</p>	<p>Not publicly available. The tool is used with support from development workers.</p>	<p>This is an in-depth organisational development tool devised around the spokes of the SKILD Development Worker Framework. Eight areas are covered:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Managing people</li> <li>● Funding and finance</li> <li>● Influence</li> <li>● Premises</li> <li>● Learning</li> <li>● Organisational development</li> <li>● Working with community groups.</li> </ul> <p>Three different level checks are available:</p> <ul style="list-style-type: none"> <li>● new groups</li> <li>● established groups who want to develop further</li> <li>● established groups who may be charities or companies limited by guarantee.</li> </ul> <p>The infrastructure partners are currently developing resources and tools to support groups with their development in each of the areas covered. These are referenced within the health checks.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
Surrey Community Action Astolat Coniers Way Guildford GU4 7HL 01483 566072	Organisational Health Check Toolkit	2006	The tool was originally developed and used by a capacity building project officer, targeting small and medium-sized organisations in Surrey.	The initial interview could take approximately 30 minutes, but it is intended as an in-depth intervention, taking 5-8 working days.	The tool is not publicly available, and is available in hard copy, which is retained by the development worker.	The toolkit is divided into eight areas: <ul style="list-style-type: none"> <li>● Governance</li> <li>● Human resource management</li> <li>● Strategic and business planning</li> <li>● Marketing</li> <li>● Other resources</li> <li>● Monitoring and evaluation</li> <li>● Finance</li> <li>● Funding and fundraising.</li> </ul>
Voluntary Norfolk c/o Council Offices Holt Road Cromer NR27 9EN 01263 516 018 <a href="http://www.voluntarynorfolk.org.uk">www.voluntarynorfolk.org.uk</a>  Francis Burrows <a href="mailto:north@voluntarynorfolk.org.uk">north@voluntarynorfolk.org.uk</a>	Organisation Health Check	Voluntary Norfolk started using the tool in May 2008.	Six Voluntary Norfolk development workers are using all or parts of the tool with both rural and urban based voluntary and community groups across most of the county of Norfolk. (West Norfolk is covered by a separate infrastructure body).  The tool was developed as part of a BASIS funded programme to support rural groups and is more suited to needs of smaller often voluntary run groups.	Between 0.5 and 2 hours to complete one section. 6-12 months to complete the whole health check process covering each of the nine areas within the tool.	Not available publicly. Specific areas of the health check are completed depending of the focus of the request for assistance and support by a group. Hard copies are used.  A copy can be requested from Voluntary Norfolk.	In-depth tool divided into nine areas: <ul style="list-style-type: none"> <li>● Legal structure</li> <li>● Governance</li> <li>● Policies and procedures</li> <li>● Volunteer recruitment and management</li> <li>● Diversity/Equal opportunities</li> <li>● Partnerships</li> <li>● Finance</li> <li>● Marketing and communications</li> <li>● Support.</li> </ul> <p>The tool comprises a Yes/No tick box format with comment box to note points from discussion.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<b>Health check tools used for both face-to-face and/or for organisational self assessment</b>						
<p>Development Trusts Association (DTA)</p> <p>33 Corsham Street London N1 6DR 0845 4588336</p> <p><a href="http://www.dta.org.uk">www.dta.org.uk</a></p> <p>Keith Smithies 0161 432 5627</p> <p><a href="mailto:k.smithies@dta.org.uk">k.smithies@dta.org.uk</a></p>	<p>Fit for Purpose: the Development Trust Association healthcheck for community enterprise organisations</p>	<p>Developed in summer 2008 then piloted and published in September 2008.</p>	<p>The tool is for new, emerging and more established organisations that want to become community enterprises.</p> <p>The tool was developed for use by DTA regional development teams across England but can also be used as self-assessment.</p> <p>The tool was piloted with three organisations before being published in September 2008. Has been used with six community enterprises between September 2008 and March 2009.</p>	<p>Takes between 2.5 – 5 hours to complete with a DTA support worker.</p>	<p>Available in hard copy for £10 from DTA or can be downloaded for free from DTA website.</p>	<p>The tool is divided into five sections:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Enterprise and Business planning</li> <li>● Financial management</li> <li>● Partnership working</li> <li>● Policies and Procedures.</li> </ul> <p>The booklet provides an explanation of how to use the tool. Each issue uses a simple ‘Fully Met, Partly Met or Not Met’ system. A ‘Comments’ box allows for more explanation of each response. It is recommended that relevant information and documents are gathered to support the responses and that the completed tool and evidence form the basis of a review meeting for staff and trustees.</p>
<p>Greater Merseyside ChangeUp Consortium, lead body Sefton Council for Voluntary Service</p> <p>0151 9200726</p> <p><a href="mailto:info@changeupmerseyside.org.uk">info@changeupmerseyside.org.uk</a></p>	<p>GRIPP</p>	<p>2008</p>	<p>Eighteen infrastructure organisations developed this online tool under the Change Up programme to be used as a quick self-assessment, which would provide an analysis of areas where groups could be supported and developed.</p> <p>The tool can also be used face-to-face either in paper format or online format.</p>	<p>Self-completion takes 10 minutes. When used face-to-face it can take 1-3 hours, as the tool can be used flexibly, as a springboard to further questions and discussion.</p>	<p>The tool can be accessed by any organisation anonymously via the Greater Merseyside ChangeUp website. A completed report can be downloaded and printed.</p> <p>It may be possible to purchase the tool or an</p>	<p>An online tool covering five prompts (framed as indicators) in each of five key areas:</p> <ul style="list-style-type: none"> <li>● Governance</li> <li>● Resources</li> <li>● Information</li> <li>● Projects</li> <li>● People.</li> </ul> <p>The report generated provides:</p> <ul style="list-style-type: none"> <li>● comparison to the average score of all the other groups that have used the tool (benchmark)</li> <li>● a breakdown of those areas to improve on</li> </ul>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
					adapted version by applying to Greater Merseyside ChangeUp.	<ul style="list-style-type: none"> <li>a list of organisations offering help in the Merseyside area.</li> </ul>
<p>Social Enterprise Works The Coach House 2 Upper York Street Bristol BS2 8SN Tel: 0117 907 0080 <a href="http://www.socialenterpriseworks.org">www.socialenterpriseworks.org</a></p> <p>Julie Ellison, Social Enterprise Adviser <a href="mailto:julie@socialenterpriseworks.org">julie@socialenterpriseworks.org</a></p> <p>Bristol City Council hold the intellectual property in the C3 tools, although tools are open source and can be freely used.</p>	Perform Diagnostic	Early 2008	<p>The tool is a legacy of the C3 EQUAL Development Partnership. The tool is used by members of the Partnership, and is also available to other infrastructure organisations.</p> <p>The online tool has had 25 users. However, the paper-based C3Quick Perform was trialled in about 75 organisations over the course of the C3 programme. Since then about 40 people have been trained in its use.</p>	15 minutes to complete by organisations. Time will vary when used as face-to-face tool.	<p>Development workers and organisations can access the tool online at <a href="http://www.socialenterpriseworks.org/benchmarking">www.socialenterpriseworks.org/benchmarking</a></p> <p>An earlier paper-based version, Quick Perform, is also available on the website.</p> <p>These tools can be downloaded and used freely, with acknowledgement.</p> <p>Social Enterprise Works provides training on these tools, together with the other C3Perform tools. <a href="http://www.c3partnership.org">www.c3partnership.org</a></p>	<p>The tool has three indicators in each of the nine areas of the EFQM Excellence Model, which can be responded to on a rating scale.</p> <p>It can be accessed by numerous people within an organisation or by multiple sites. The programme will collate responses and provide an overall score. The score can be benchmarked against other organisations.</p>

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
<b>Self-assessment health check tools</b>						
C3 Partnership <a href="http://www.c3partnership.org">www.c3partnership.org</a>	C3Perform	The tool was developed by the C3 EQUAL Development Partnership as part of an Equal funded programme, 2004-2007.	The tool is used by members of the Partnership, and is also available to other infrastructure organisations across the country.	n/a	Development workers and organisations can access the tool online at <a href="http://www.c3partnership.org">www.c3partnership.org</a> . There is also a Workshop Perform. These tools can be used freely, with acknowledgement. Social Enterprise Works provides training on the family of C3Perform tools.	The C3 Perform self-assessment workbook follows the nine sections of the EFQM Excellence Model. Assessment is carried out around 46 positive statements, encouraging evidence to support them, and allowing scoring against each section. The workbook is designed to involve between one and eight people in reviewing the organisation's strengths and areas of improvement. Guidance notes provide additional support.
Development Trusts Association (DTA) 33 Corsham Street London N1 6DR 0845 4588336 <a href="http://www.dta.org.uk">www.dta.org.uk</a>  Keith Smithies 0161 432 5627 <a href="mailto:k.smithies@dta.org.uk">k.smithies@dta.org.uk</a>	Early Warning Guide	2008	The check is intended for use by board members and senior managers of third sector organisations, large and small.	n/a	Hard copies, attractively formatted, are available for £2 from DTA, free to members. Copies can be downloaded for free from the DTA website.	This is a 'quick check' using a traffic light system aimed at highlighting problem areas and stimulating discussion between board and staff members. The booklet is a simple design using bold graphics for statements relating to red, amber and green lights under 16 key questions relating to finance and governance. A notes page is provided against each of the questions. The Office of the Third Sector has shown interest in the guide as organisations face an even more challenging time in the current economic climate.

Originator / copyright holder and contact details	Name of tool	When was it developed?	Who uses it?	How long does it take?	How is it accessed?	What areas does it cover? Any other characteristics?
Voluntary Arts Network Daniel Carpenter 029 20 395 395 <a href="mailto:Daniel@voluntaryarts.org">Daniel@voluntaryarts.org</a>	Way Ahead: A development workbook for voluntary organisations	2001	Voluntary arts organisations	n/a	The workbook is available from Voluntary Arts Network.  Statutory bodies: £100  Voluntary organisations £100,00 or more: £50  Smaller organisations: £30  Post Box 200 Cardiff CF5 1YH <a href="mailto:information@voluntaryarts.org">information@voluntaryarts.org</a>  02920 395 395	The toolkit contains eight checklists. Each contains 20 statements 'to stimulate your thinking'. It also includes a guide to using checklists plus record forms to keep a record and a brief guide to suggest ways to use results to make an action timetable and business plan.