



A self-assessment **needs-analysis tool** for voluntary and community organisations

Commissioned by the
Finance Hub from NCVO's
Sustainable Funding Project

Written by Triangle Consulting

Self determination – who we are and the choices we have

Inconsistent beliefs and practice. May be exclusively defined as responding to particular needs, not achieving positive change.	1
There is a mission or mission statement – somewhere – but this not communicated or “lived” in practice. Very reactive to external events.	2
Understand that knowing what the organisation does and does not do is important in relation to external pressures.	3
Willing to invest in questioning what is really important and identifying the essence of the organisation. May shed some aspects that do not fit.	4
Mission and values clearly defined and increasingly practiced and shared by staff, volunteers and trustees.	5
Values practiced and communicated externally – image clearer and attracting others who also value what the organisation has.	6
Know what the organisation does has real value, and we can say no to funding or partnerships that do not fit with our values and direction.	7

Organisational culture

Fear of or resistance to change. Fear of loss of mission, or being swamped. May be inconsistency between individuals.	1
First awareness that things could be different, but not knowing how and may be dismissed as “not for us” without consideration.	2
Some understanding of how others generate income and more openness to exploring what is relevant and needed.	3
Resolve to really put energy and resources behind finding new and appropriate ways to generate income.	4
Trying new things. Able to commit to action and willing to take some risks, with an emphasis on learning.	5
Increasingly know what is appropriate and how to do it. Outward-looking, open to partnerships, ideas and new ways of doing things.	6
Entrepreneurial spirit, strategic and responsive. Strong shared mission and values Internally and communicated externally.	7

Planning

Responding to whatever is happening and to crisis. Planning viewed as not appropriate, feasible or necessary.	1
Awareness of some of the benefits of planning, but not the will or motivation to set time aside to do it.	2
One or more plans, but in someone’s head or for funding applications or isolated projects and are not communicated or referred to in practice.	3
Space devoted to involve staff and Board members in planning for the organisation (e.g. in an away day).	4
Action taken to plan together. Planning integrated into job descriptions, objectives and/or supervisions.	5
Staff have plans related to a strategic plan for the whole organisation. These are live, referred to, used in practice and regularly reviewed.	6
Long-sighted strategic approach, intergrated with working so that core values translate into practice. Able to be proactive and responsive.	7

Financial management

Records in a box file – hopefully all there but may not be.	1
Basic book-keeping done, possibly by a part-time volunteer. Year end accounts may be done externally, but financial information not used.	2
Limited reporting of financial information (e.g. cash flow and project balances). Increasing demands from manager(s) for information.	3
Space devoted to involve staff and Board members in financial planning (e.g. in an away day).	4
Financial information used for management and Board decision-making. More understanding of costs/Full Cost Recovery.	5
Good costing, forecasting and budgeting. Staff, management and Board understand about costs and income and use financial information.	6
Financial processes and knowledge integrated into governance, planning decisions and strategy. A clear financial strategy.	7

come in from the cold

1

2

3

4

5

6

7

6

5

4

3

2

1

to sustainable sunshine

Plotting where your organisation is now on the Sun will help you consider what your next steps should be in each of seven areas which are integral to long-term sustainability. The blank ray is for you to label and use to measure something important for your organisation, such as developing a particular type of income or skills area. Revisit every six months to plot your organisation's progress. Display the Chart on your wall as a reminder of priorities and progress.

For further resources see www.financehub.org.uk and www.ncvo-vol.org.uk/sfp.

Funding base

1	Going to advisors saying: "Help! We are going to run out of money next month/in 3 months!"
2	Some awareness of different ways of generating income, but do not consider this as a realistic option.
3	Understand some concepts around diversified and appropriate income sources, and may try room rental or other services for small amounts.
4	Open to possibilities of different income sources and decide to devote resources to really find out and start to pursue what is possible.
5	Trying new ventures and/or reframing some projects to approach different funders. May experiment with trading, contracts and/or loans.
6	Increased diversity and appropriateness of income. Discovering what is not suitable. New relationships emerging.
7	Enough funding for now and from sufficiently diverse and/or appropriate sources. Clear and ongoing income generation strategy for the future.

Skills for sustainability

1	Lacking in skills. No intention of getting them. Reluctance to expect too much from volunteers or to look outside the organisation.
2	Know particular activities might help generate income and but don't know how to do them so not planning to explore them.
3	Some individuals have some skills, but no overall sense of what is needed or how to make best use of existing skills.
4	Dedicate space to work out what skills are needed, what staff, volunteers and trustees have already and how to develop or bring in skills needed.
5	Access training, mentoring and/or seeking external expertise as part of an increasingly strategic learning plan to get the necessary skills.
6	Clear definitions of core skills/competences and increasingly have the in-house capacity or access to skills needed.
7	The organisation has access to all the skills required to implement plans for greater sustainability.

Outcomes

1	Not aware of, or not thought about, outcomes of the work. Pretty sure it would be too difficult and/or not relevant.
2	Heard about outcomes monitoring, some curiosity, but not sure that it is really relevant, or how to go about it.
3	Some understanding of outcomes possibly action by individuals or an isolated pilot. External pressure may be the driving reason to try.
4	Decide to monitor outcomes, and start to invest the time and money to find out how to do so effectively.
5	Have a way to measure changes (outcomes) that has been piloted, integrated into ways of working and with buy-in across the organisation.
6	Learning what outcomes information means and using it. Internal curiosity to learn about what works and how to demonstrate success externally.
7	Can easily demonstrate and communicate results – can show how the work of the organisation makes a difference.

1	
2	
3	
4	
5	
6	
7	

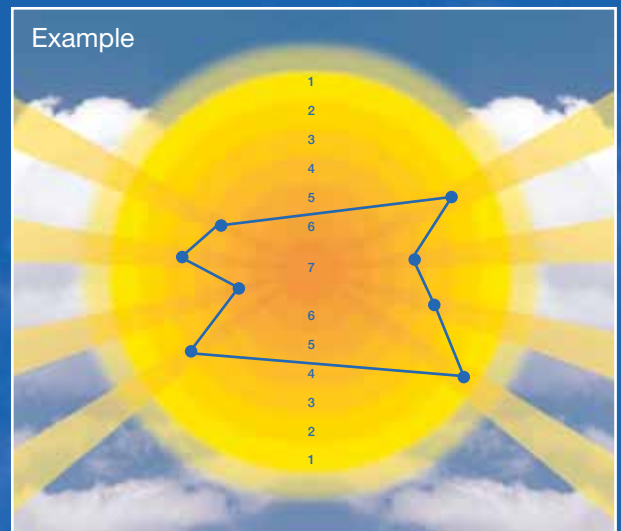
What is the Sustainable Sun?

Becoming more sustainable often means making changes in a number of aspects of your organisation. The Sun is designed to help you work out where you are now in each of seven areas which are integral to long-term sustainability.

How to complete and use the Sun

The Sun is best completed by one or more people from your organisation working with a funding advisor at a local Council for Voluntary Service or other support agency. However, it can be completed independently. The steps are:

1. Familiarise yourself with the 'journey of change' described opposite. This outlines likely attitudes amongst staff and volunteers to progressing through the stages described within the Sun's rays.
2. Discuss each ray in turn, in terms of your organisation's approach and activities. Focus on your organisation overall, not the skills, experience or attitudes of particular individuals.
3. Decide together which stage (1-7) best describes where your organisation is on the ray and mark that point with a dot (one per ray).
4. Join the dots you have marked on each ray.
5. Finally, look at the shape created with your funding advisor and discuss:
 - What is going well? (points 5-7)
 - Which areas hold you back? (points 1-4)
 - What steps can we take to improve?



If you have difficulty deciding between two numbers, refer back to the 'journey of change' and think about the underlying attitudes, culture and approach of your organisation. If people do not agree, embrace that as an opportunity for discussion and explore why people have different perceptions. If you still do not agree, you can always mark both views on the Sun.

Revisiting the Sun

After a few months, complete the Sun again, going through the same process and joining the dots on the Sun. You will see from this where your organisation has grown and identify areas to work on next.

The journey of change – coming in from the cold...

Achieving long-term sustainability often requires making changes. Change is a journey; it does not happen overnight but as a series of steps, some harder or with more immediate effects than others. The Sun tool is based on an understanding of the organisational journey towards greater sustainability, expressed in seven stages. These stages describe the attitude, culture or approach of organisations to each of the areas represented by the rays. Key stages on the journey are:

- **Points 1-3** Organisations move from lack of knowledge and/or resistance to change to greater understanding and considering different ways of doing things, possibly with some inconsistency or barriers.
- **Point 4** Can be seen as an important tipping point. From this point on, organisations are putting energy and resources behind developing new skills, sorting out financial systems or other aspects of change towards greater sustainability.
- **Points 5-6** More consistent changes happen, with greater buy-in from everyone.
- **Point 7** Looks very similar in all the rays, because by this stage all aspects of the organisation are aligned to maximise sustainability.

Examples of the kind of attitudes expressed at each stage are:

1	'We don't know what to do, how to do it, don't want to do it, and it's not us'
2	'Things could be different, but we're not sure how, and it's probably not for us'
3	'We have some understanding of how others become more sustainable, it might be possible for us...'
4	'It's time to try new things' or 'let's go for it!'
5	'We're trying new things, committing to action and increasingly willing to take some risks, with an emphasis on learning'
6	'We would never have believed we could do what we are doing now'
7	'We're entrepreneurial, strategic and responsive'

Consider which of these attitudes best describes your organisational approach and use the additional descriptions in the rays to complete the Sun chart to take your first steps towards a warm and glowing sustainable future!

Further support and resources

To find out more about your funding and financing options see the *Introductory Pack on Funding and Finance* and accompanying *Toolkit*. Both resources are available at www.financehub.org.uk and www.ncvo-vol.org.uk/sfp/Introductory-Pack.