

# Recovery and Resilience Fund Self-Assessment

This self-assessment helps you and DTA Scotland understand your organisation's current strengths and areas for development across six key pillars of resilience. Your responses will guide what kind of support – funding or otherwise – may be most appropriate at this time. Please answer honestly. There are no right or wrong responses, and your answers will not affect your eligibility.

## Organisation Information

**Organisation Name (per DTA Scotland Membership Name) \***

**Name \***

First Name

Last Name

**Email \***

example@example.com

**Role \***

**Has this self-assessment been completed in partnership with both staff and trustees? \***

Yes, both staff and trustees contributed

Yes, but mostly staff input

Yes, but mostly trustee input

No, completed by staff only

No, completed by trustees only

Other

# 1. PURPOSE

Outcome: Board and staff demonstrate improved clarity and confidence in articulating and implementing the organisation's purpose and strategic direction

## How well do people understand what your organisation is trying to achieve?

We're not clear about this

We've written it down, but most people don't know it or have a different understanding of what it is

The board and staff understand it; but our community maybe doesn't

Most people in the organisation and community understand it, and we use it to help with our work

Everyone understands it and uses it to guide what we do

## How much of your daily work is aligned to a strategic plan incorporating your vision, mission, values and objectives?

We don't have these written down

We have some of these written down, but rarely use them

We have these written down and sometimes think about them when making decisions

They help guide our planning and day-to-day work

They guide all our work and are reviewed regularly

## How confident are you that your purpose reflects current community needs?

Not Confident

Slightly Confident

Moderately Confident

Confident

Very Confident

# GOVERNANCE & LEADERSHIP

Outcome: Organisations show strengthened leadership capacity, more effective governance practices, and enhanced decision-making processes

## How well does the board understand and carry out its roles and responsibilities?

We don't do much, or are unsure what to do, or nothing is written down

We have roles, but these aren't always clear

We have a basic understanding of our roles and responsibilities

We are confident in our roles and responsibilities, but these are not reviewed

We have a full understanding of our roles, engage in training or development and review our roles and responsibilities regularly

## How confident is the board in leading the organisation?

We mainly react to problems.

We meet, but don't always provide strong oversight and direction

We feel confident and work towards shared goals  
We lead well, plan ahead, assess risks and involve others

### **How transparent and fair are your decision-making processes?**

We decide things without clear steps or collective responsibility  
We have some processes, but don't use them all the time  
We agree on most decisions and write them down  
Our decision-making is transparent and fair  
We make decisions on time, collectively, share them openly, and implement them

## **FINANCE, FUNDING & ENTERPRISE**

Outcome: Organisations demonstrate income diversification, increased confidence in financial management, and a more enterprising approach.

### **How reliable are your financial systems?**

We don't have a budget or plan, and don't track our finances  
We have some processes, or a basic budget, but don't apply them  
We have a system and process that are mostly used by one person  
Our system and processes include a budget, cash flow, and a plan for change.  
Our systems and processes are up to date, well-used and fully understood by staff and board

### **How diverse are your funding and finance sources?**

Most of our funding comes from one or two sources, and we do not have a funding and finance plan.  
We have a few other sources of funding and finance but we still do not have a funding and finance plan  
We're starting to look at a plan for diversification of funding and finance sources  
We have a funding and finance plan and have started to diversify our funding and finance sources, but this has not been fully implemented  
We follow a clear funding and finance plan that supports our purpose, and have a diverse range of funding and finance sources

### **How enterprising is your approach?**

We have never considered trading or enterprising opportunities  
We have considered a more enterprising approach but have not made any changes  
We have made some progress towards increasing our trading and enterprising activities  
We undertake a good amount of trading and enterprising activity and are moving away from grant dependency  
We are financially sustainable due to our enterprising approach

## **PEOPLE & OPERATIONS**

Outcome: Staff and volunteers have improved skills, knowledge and wellbeing, internal procedures are better defined and utilised

### **How confident and skilled are your staff and volunteers in delivering their roles?**

Staff and volunteers don't understand their roles, and we don't provide any training or support.

Staff and volunteers understand their roles, but we don't provide any training or support.

Staff and volunteers understand their roles and get some support

Staff and volunteers have learning and development plans in place.

We have a culture of continuous learning and development, staff and volunteers have the skills and knowledge they need to excel, and we have succession plans in place

### **How reliable are your day-to-day policies and systems?**

We have no formal policies or systems in place

We have some policies, but they're not consistent and not updated regularly and our systems are mainly out-of-date or unused

We have basic policies that most people follow and systems that some people are comfortable to use

Our policies and systems of working are written down and broadly followed but not regularly reviewed

Our policies and systems are up-to-date, reliable, fully meet our needs and staff feel confident in using them

### **How much do you support staff and volunteer wellbeing?**

We don't focus on wellbeing

We think about it occasionally

We support it in informal ways, but we don't have the resources to deliver it formally

We are beginning to implement formal wellbeing initiatives

Wellbeing is embedded in our organisational culture and policies, and staff have an effective voice

## **COMMUNICATIONS & IMPACT**

Outcome: Organisations demonstrate stronger communication, improved community engagement and clearer articulation of impact through effective evaluation.

### **How effectively do you engage with your community?**

We rarely engage them

We engage them sometimes, but we don't know how to use the feedback

We ask for and use their input, but this is limited to specific activities

We regularly engage with our community and try to use this to inform our work

We regularly engage with our community, their voice and needs feed into the planning, development and delivery of everything that we do

### **How planned and consistent is your external communication?**

We don't communicate externally

We only communicate when we have to, or our communication is inconsistent

We share updates with the community and people we work with, but we don't have a plan or strategy in place

We have a formal communication plan or strategy but we don't always implement it

We use our communication plan or strategy, and our communications are proactive and tailored to

different audiences

### **Can you demonstrate the positive impact of your work through effective evaluation?**

We do not currently track or evaluate our impact.

We collect basic data (e.g., number of service users), but make limited use of it.

We evaluate and report on the impact of some activities, but this is done irregularly.

We have a process in place to evaluate our impact and communicate our insights, but we don't always reflect on the learnings.

We regularly evaluate our impact, share what we learn, and use these insights to continuously improve our services and activities.

## **ASSETS**

Outcome: Organisations exhibit increased knowledge, confidence, and control in the effective management and development of their physical assets

### **Can you confidently assess opportunities to acquire physical assets for your community?**

We don't have any desire to assess opportunities to acquire assets,

We would like to start exploring opportunities, but we don't know where to start

We have started to consider asset opportunities, but we do not have the confidence or capacity to take this forward

We have identified specific asset opportunities, but limited capacity is holding us back

We have the capacity to confidently assess the viability of asset opportunities and make informed decisions considering risk and community need

### **Do you own or long-term lease any physical assets including building(s), land, green space, community transport vehicle(s), renewable energy infrastructure and / or other physical asset(s)**

Yes

No

### **How well do you manage your physical asset(s)?**

We do not manage our physical asset(s) or we do not know how to manage our asset(s)

We address issues with our asset(s) when they arise but we have no records or processes in place

We manage our asset(s) using basic records and processes, but we have no capacity to develop a formal plan

We have an asset management plan, but we have limited capacity or confidence to use it

We have an asset management plan that we have the capacity to regularly use and update to confidently manage our asset(s)

### **How much do your assets help your organisation?**

Our asset(s) are significantly underutilised and / or place a large financial burden on the organisation

Our asset(s) often feel like a financial burden or are not consistently used to their full potential

Our asset(s) supports us to achieve our purpose in limited ways, but we lack the capacity to develop its full potential

Our asset(s) is not a financial burden and broadly supports us to achieve our purpose

## Self Assessment Results

Below, you'll find a summary of your responses across the six pillars of resilience. Each section includes a brief statement reflecting your organisation's current position, followed by an overall assessment. This also highlights areas that you should explore as a priority

## Reflection & Support Requirements

Now that you've completed the self-assessment, please provide a short outline of what support your organisation requires via this programme.

### Support Required (300words)

0/300