

Getting to know your group's needs



Being a volunteer is easy, right? You have a full management committee, your meetings run perfectly, the money is flowing in, everyone shares the work and it all gets done on time. In fact, your group pretty much runs like clockwork.

If this is your experience of running a voluntary group, congratulations! You probably don't need to read further.

Actually, the reality for many volunteers is very different. They start off doing something they enjoy, but as the group grows, things become more complicated.

CAVOS would argue that it is **not** easy to be a volunteer. Running a voluntary group can be a minefield if you are not prepared and ready for what is to come.

You are not on your own!

CAVOS is the organisation that supports voluntary and community sector groups like yours and we need to know what kind of help and support you need.

We have compiled a set of questions to help you think about your group. By the time you have answered them all, you will understand a little bit more about running your group and you will be able to put measures in place to help you tackle issues before they arise. We are here to help you do just that.

These questions are about your whole group and its committee and we need you to answer them as truthfully as possible. You don't have to do everything suggested in this form immediately. Some of the things will be priorities, others can be done later. We will help you decide what is most important.

We suggest that as many members as possible take part in answering this questionnaire.

1. About your group	Yes	No	Not sure
1.1 Do you know the background to your group?			
1.2 Do you know what your group wants to achieve in the future?			
1.3 Does your group have an action plan?			
1.4 If 'yes' to 1.3, do you review your plan regularly?			



If you have ticks in any of the shaded boxes your group may benefit from CAVOS support to **plan for the future**.

2. The rules of your group	Yes	No	Not sure
2.1 Do you have a signed and dated constitution?			
2.2 Do all committee members have a copy?			
2.3 Do all members understand what it means for them?			
2.4 Do you regularly review your constitution to ensure that it is appropriate for your current activities?			



If you have ticks in any of the shaded boxes you may benefit from:

- A session with CAVOS to review your Constitution
- Using the CAVOS 'How to Guide' on Constitutions

3. Roles and Responsibilities of the Management Committee	Yes	No	Not sure
3.1 Is everyone on your committee aware of their roles and responsibilities?			
3.2 Do you have written task outlines for your Chair, Vice Chair, Treasurer and Secretary			



If you have ticks in any of the shaded boxes you may benefit from:

- A session with CAVOS to review your Constitution
- Using the CAVOS 'How to Guide' on roles and responsibilities

4 Meetings	Yes	No	Not sure
4.1 Is everyone in your group aware of / kept informed of your meetings schedule?			
4.2 Do you provide agendas for your meetings?			
4.3 Do you make your group's decisions at your meetings?			
4.4 Do you record your decisions in the minutes?			
4.5 Do you ensure that everyone who is entitled to see a copy of the minutes has the opportunity to do so?			
4.6 Do you know who is eligible to vote at meetings?			



If you have ticks in any of the shaded boxes you may like to consider using the CAVOS 'How to Guides' on **running effective meetings** and/or **effective minute taking**.

If you have ticks in any of the shaded boxes in sections 2, 3 and 4, you may benefit from attending the **CAVOS 'Good Governance' training course**

5	Finance	Yes	No	Not sure
5.1	Do you produce annual accounts?			
5.2	Do you keep accounting records?			
5.3	Do you produce monthly financial reports?			
5.4	Do you have 2 or more signatories on your account?			
5.5	Are you aware of your legal financial responsibilities			



If you have ticked any of the shaded boxes, you may wish to consider:

- **A basic bookkeeping course**
- **A session with CAVOS to review your financial procedures**

6.	Policies to Practice	Yes	No	Not sure
6.1	Do you know which policies your group needs?			
6.2	Do you have these policies in place?			
6.3	Do you understand your policies?			
6.4	Do you actively implement your policies?			
6.5	Do you review your existing policies regularly?			



If you have ticked any of the shaded boxes your group may benefit from:

- **Attending a CAVOS training course on Policies.**
- **A session with CAVOS to review your policies**

7.	Insurance	Yes	No	Not sure
7.1	Do you know which insurance your group needs?			
7.2	Do you have the relevant insurance in place?			
7.3	Do you understand why you need this insurance?			



If you have ticked any of the shaded boxes, why not let CAVOS advise you on the insurance your group needs to comply with your legal obligations?

8	Funding	Yes	No	Not sure
8.1	Do you need help to identify suitable funding?			
8.2	Are you aware of the different fundraising options available to you?			
8.3	Do you need help to develop a successful funding bid?			
8.4	Does all of your committee (or relevant sub-group) help with funding bids?			
8.5	Does all of your committee understand how to manage money from funders?			
8.6	Is your group confident about monitoring and evaluating the progress and outcome of your projects and reporting back to funders?			



If you have ticked any of the shaded boxes, you may wish to consider:

- **Attending a CAVOS 'Everything You Need to Know About Funding' training course**
- **Accessing CAVOS Funding Advice Service**

9	Employment	Yes	No	Not sure
9.1	Does your group employ staff? If no, go to section 10			
9.2	Is your group aware of the legal and social responsibilities of being an employer?			
9.3	Does your organisation have proper recruitment/selection and development procedures in place?			
9.4	Do you have an appropriate staff handbook?			
9.5	Do you have an induction process			
9.6	Do you keep up to date with employment legislation?			
9.7	Do you know which staff roles require CRB checks?			
9.8	Does your group do CRB checks for staff requiring them?			
9.9	If yes to 9.8, do you have relevant procedures in place to handle CRB checks and CRB information?			
9.10	Are you aware of your legal responsibilities regarding employing staff with a criminal record?			
9.11	Does your committee know the difference between spent and unspent criminal convictions?			
9.12	Has your group considered which types of convictions may or may not be appropriate to the job?			



If you have ticked any of the shaded boxes and you currently employ staff or intend to in the future, you may benefit from the following:

- **Attending CAVOS Employment Law seminar**
- **Contacting CAVOS for advice regarding CRB checks or and/or specific employment issues.**
- **Accessing CAVOS CRB Disclosure Service**

Involving Volunteers

10.	Volunteering	Yes	No
10.1	Does your organisation involve volunteers?		



If you have ticked 'yes' please continue to the rest of the questionnaire. If you haven't already, why not register with the [Volunteer Centre](#)?

11.	Policies and Procedures	Yes	No	Not sure
11.1	Does your organisation have a volunteer policy?			
11.2	Are policies and procedures communicated to all staff and volunteers?			
11.3	Does your organisation have a Volunteer Handbook?			
11.4	Do you pay volunteer expenses?			
11.5	Do you have a policy in place regarding volunteer expenses? (I.e. what is reimbursed and what is not)			
11.6	Do volunteers receive an induction to the organisation?			



If you have ticked any of the shaded boxes, your group may benefit from a session with CAVOS on '[Volunteer Policies & Procedures](#)'

13.	Recruitment and Selection of Volunteers	Yes	No	Not sure
13.1	Are people who are interested in volunteering provided with clear information?			
13.2	Do all volunteer roles have a written task outline that includes duties and responsibilities?			
13.3	Is feedback given to volunteers whose applications have been turned down?			
13.4	Do you have any age/gender restrictions			
13.5	Do you have disabled access?			
13.6	Do you offer any training to volunteers?			
13.7	Do you have a procedure for taking up references that are relevant to the role the volunteers will be taking?			
13.8	Can volunteers with additional support needs become involved in your organisation?			
13.9	Does the organisation have clear criteria in terms of skills and abilities needed, against which it assesses volunteers' suitability for particular roles?			
13.10	Do you know which volunteer roles require CRB checks?			
13.11	Does your group do CRB checks for volunteers whose roles require them?			
13.12	If yes to 13.8, do you have relevant procedures in place to handle CRB checks and CRB information?			
13.13	Are you aware of best practice procedures around involving volunteers with a criminal record?			
13.14	Does your committee know the difference between spent and unspent criminal convictions?			
13.15	Has your group considered which types of convictions may or may not be appropriate to the voluntary work being undertaken?			



If you have ticked any of the shaded boxes, you may wish to contact CAVOS for advice regarding CRB checks. You may also benefit from:

- **Attending the CAVOS 'Volunteer Recruitment' training**
- **Accessing the CAVOS CRB Disclosure Service**

12.	Supporting Volunteers	Yes	No	Not sure
12.1	Is there a designated person or group of people who are responsible for volunteers?			
12.2	Are the people who supervise volunteers appropriately trained in managing volunteers and the organisation's policies?			
12.3	Does your organisation have a process in place for carrying out supervision or appraisals with volunteers?			
12.4	If so, is the person responsible trained to carry out appraisals/supervision or informal reviews?			



If you have ticked any of the shaded boxes, your group may benefit from accessing the following CAVOS training

- **'Supporting Volunteers'**
- **'Motivating & Retaining Volunteers'**

16.	Reward and Recognition	Yes	No	Not sure
16.1	Are the contributions of volunteers regularly acknowledged with formal or informal methods of recognition			
16.2	Do you use links with the community to gain recognition for individuals and teams of volunteers? (e.g. Volunteer Awards Evening)			



If you have ticked any of the shaded boxes, why not contact the Volunteer Centre for more information on the [Volunteer Awards Evening](#)?

Would you like to consider taking up some of the suggestions we have made throughout the document?

Please tick the areas you are interested in below.

Activity	Please tick
Planning for the future	
'How to Guide' on 'Constitutions'	
'Constitutions' review session	
'How to Guide' on 'Roles and responsibilities'	
'Roles and responsibilities' review session	
'How to Guide' on 'Running effective meetings'	
'How to Guide' on 'Effective minute taking'	
'Good Governance' training course	
'Basic Bookkeeping' training course	
Financial procedures review session	
'Policies' training course	
'Policies' review session	
Insurance advice	
'Everything You Need to Know About Funding' course	
Access CAVOS 'Funding Advice Service'	
'Employment Law' seminar	
'Employment Law' advice	
CRB related advice	
CAVOS CRB Disclosure Service	
'Volunteer Policies & Procedures' course	
Volunteer Centre support	
'Volunteer Recruitment' training course	
'Supporting Volunteers' training course	
'Motivating & Retaining Volunteers' training course	
Information on the Volunteer Awards Evening	

There may be other issues we have not covered here that you need help with. Sometimes these may be for the group as a whole (such as those mentioned above) or they may concern individuals (such as computer training or youth work studies.

If you have any other support needs, please list them in the box below.

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Your contact information

Name of organisation	
Contact person	
Address	
Phone	
Email	

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