SHIRIKA HEALTH CHECK

For Arts Organizations in Africa

How healthy is

your arts

organization?

ARTERIAL NETWORK

CULTURAL DEVELOPMENT TRUST

Africalia belgium

STICHTING DOEN

What is SHIRIKA?

SHIRIKA is a programme of Organizational Health Support for the Arts, facilitated by Arterial Network and Cultural Development Trust on the African continent, with seed funding from Africalia during 2016. To find out more about the programme and available opportunities go to: www.arterialnetwork.org

The vision of the SHIRIKA programme is '*an African creative sector that is thriving economically and socially'* thanks to the sustainability, performance and competitiveness of its organizations.

We believe that for arts organizations to be sustainable, performant and competitive, they need to be healthy first.

What is a healthy arts organization?

One of the ways to define organizational health is the "*organization's ability to function effectively, to cope adequately, to change appropriately, and to grow from within.*"

At SHIRIKA, we define a healthy arts organisation as an organisation that:

1. Operates in or for the Arts and Culture or Creative sector.
2. Has defined its organizational statements that are put into practice by a strategic plan.
3. Has an organizational structure in place that ensures the efficiency of the organization in implementing its strategy.
4. Has policies and systems in place that ensure the organization respect laws and principles of good governance.
5. Has policies and systems in place that ensure the organization is able to report and manage financial issues according to any sustainability requirements and organisational development.
6. Has policies and systems in place that enable the organization to manage its human resources to be as efficient and competitive as possible.
7. Has systems in place that ensure all activities and structures are regularly monitored for improvement purposes.

What can SHIRIKA's Health Check do?

SHIRIKA's Health Check can help you assess the health of your organisation in terms of the definition detailed above. It is designed as a self- assessment tool so that you can assess your organization and:

- Take actions accordingly if your organisation is "sick" in one or several areas
- Monitor the progress of changes implemented

What can SHIRIKA's Health Check NOT do?

Every organisation is different and this will reflect in the way you will manage its health. No approach will fit all arts organisation. However, SHIRIKA's Health check states a set of good practices that are the foundation of good practices for most organisations and shall give a good idea of the level you are at.

SHIRIKA's Health Check only provides a general indication of the health of your organisation. The list is non exhaustive and does not include a standard set of procedures, this will however be available soon in the form of an online SHIRIKA's toolkit.

The Health Check is NOT designed to: help your organization qualify for partnership or funding; compare scores of two organisations. That approach would influence the way in which organisations score themselves, and would be too arbitrary.

Who is SHIRIKA's Health Check designed for?

It has been particularly designed for small and medium sized organisations in the African Creative Sector, particularly non-profit or businesses also relying on external funding.

How to use SHIRIKA's Health Check?

The Health Check should be filled by the management team, specific roles will be indicated for each section, however the most useful way is to schedule a 2/3 hours brainstorming workshop with different (and relevant) representatives of the staff. Each section should have the name, designation and signature of the person taking responsibility for the section and who will ensure that any corrective action is implemented. Then repeat the exercise 6 months later to see what improvements have been put in place and whether it has been successful or not.

We cannot emphasize it enough: be honest. An "arranged" result will not help you improve!

Taking each statement of best practice in turn, discuss whether it is true, or is in place, or happens in your organisation. Agree on a score based on what actually happens, not what is supposed to happen, or what is documented. The scores available are 5,4,1 and 0 only.

Explanation	Score
Our practice is totally (100%) in accordance with the statement.	5
Our practice is close to 5, but not quite there.	4
Our practice is close to 0, but not that poor.	1
This is not at all (0%) true, it is not in place or does not happen	0

Clearly a degree of judgement is required to decide between 4 and 1, it is NOT an exact science. If you cannot give yourself a clear cut 5 or 0, you need to decide which one you are closer to.

The REAL value in this exercise is not the score itself but the conversations and details of issues discussed as a group to decide on the score. Make good notes and keep a list of action points as they come up.

Ring the score for each statement. Add up total for each section and transfer it to page 12 to get a total. Then interpret the score using the guidance given.

Comments

SHIRIKA welcomes comments on this tool. Please let us know if you are using SHIRIKA Health Check and send any comments or suggestions you might have to:
cb.applications@arterialnetwork.org

Acknowledgements

We would like to acknowledge Mango's large contribution to this tool, SHIRIKA health check has been inspired by the work of Mango and some parts of this tool are entirely extracted from Mango Health Check for financial management. We cannot improve what has already been done at its best and we thank Mango for their support. For more info: www.mango.org.uk

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Specificities of the Arts and Culture Sector

Organizations in the Arts and Culture sector have specific challenges that can get in the way of their organisational health such as: managing non tangible products in most cases as well as a broad spectrum of bi-products, dealing with a quick changing and almost non researchable market, working with creatives reconverted to management without having the specific skills or training. It is important your organisation is aware of those particular issues in order to address them accordingly to stay healthy.

[Recommended for this section: Leadership position]

Fill the date for score 1 and for score 2 (ONLY when you score again, at least 6 months later)	Date:				Date:			
	Score 1				Score 2			
The management team of our organisation regularly undertakes a SWOT analysis to identify the internal strengths and weaknesses of the organisation as well as the external opportunities and threats in the arts & culture sector.	5	4	1	0	5	4	1	0
Before scoring: Check when was the last SWOT analysis conducted. Write your own SWOT analysis, ask some of the staff members to do the same and compare the results.								
Leadership (and possibly staff members) in the organisation is encouraged to read/discuss papers, to attend conferences or to research in order to understand better the specific challenges of the arts & culture sector that affect the organisation.	5	4	1	0	5	4	1	0
Before scoring: List the events, papers or research that the organisation was involved or discussed about in the past few months and compare with the statement above.								
The organisation counts one or several memberships into networks or broader organisations to benefit from their expertise and access to information related to the arts & culture sector.	5	4	1	0	5	4	1	0
Before scoring: List the networks or broader organisations your organisation is part of and compare is with a list of networks or broader organisations available/relevant to your organisation to see what you might be missing on.								
Total Score for Specificities of the Arts and Culture Sector								

Name, position and signature of the person who is responsible for this section:

Organisational Statements and Strategic Planning

In order to let the rest of the world know what you stand for, your organisation needs to have a clearly defined vision, mission and shared values. The staff and all members of the organisation should know and relate to those statements.

By the time you have a vision and a mission, anyone should be able to answer the following questions: Who are you? Why do you exist? What do you intend to accomplish? Where and for whom will you achieve your purpose? How is this organisation unique? What are the principles and values of the organisation? With the strategic planning process, the management team and staff members should be able to know how you will implement your answers to those questions.

[Recommended for this section: Leadership position]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date: Score 1				Date: Score 2			
Our organisation has a vision that reflects a dream, a precise statement of what the organisation aims to accomplish on the long term. It provides a framework for the work and gives to the staff a shared sense of purpose. The vision is accurate, easily understood and broad enough to win support.	5	4	1	0	5	4	1	0
Before scoring: Write down your vision's organisation and compare with the statement above.								
The organisation has a mission that describes what must be done to realise the vision, the steps that must be taken to reach the dream.	5	4	1	0	5	4	1	0
Before scoring: Write down your mission and compare with the statement above.								
The organisation has clear aims and objectives (It can be in the mission). Aims are changes you want to have happen because of your organisation's activities. It is the outcome of activities, not the activities themselves.	5	4	1	0	5	4	1	0
Before scoring: Write down the aims of your organization and compare with the statement above.								
Our organization's values are distilled into statements that are concise, engaging and uplifting (It can also be in the vision).	5	4	1	0	5	4	1	0
Before scoring: Write down the values of your organization and compare with the statement above.								
All staff members know and support the statements of the organisation.	5	4	1	0	5	4	1	0
Before scoring: Ask some of your staff members what is the vision and mission of the organisation and see how many are able to share it on the top of their head.								
Our organisation has a regular (at least every 5 years) strategic planning process to set priorities, focus resources, strengthen operations, establish agreement around intended outcomes/results, and adjust the organization's direction in response to a changing environment.	5	4	1	0	5	4	1	0
Before scoring: Ask yourself if there has been a strategic planning process in the past 5 years and if it covered what is listed in the statement above.								
All staff members and stakeholders have been asked to give input on the strategic planning process and have been communicated the final strategic plan once approved.	5	4	1	0	5	4	1	0
Before scoring: Check what was the approach of the last strategic planning process and its communication plan.								
The organisation has a strategic plan that was produced in the last 4 years and reviewed during the past year. This plan communicates the organizations goals, the actions needed to achieve those goals and how it will know if it is successful.	5	4	1	0	5	4	1	0
Before scoring: Check the date of the last strategic plan and its reviewing process. Verify the strategic plan include the points listed in the statement above.								
Total score for Organisational Statements and Strategic Planning								

Name, position and signature of the person who is responsible for this section:

Organisational Structure

A structure depends on the organization's objectives and strategy. Organizational structure is the method by which an organization communicates, distributes responsibility and adapts to change. In order to be efficient in implementing its strategy, achieve its goals and define how responsibilities are assigned, an organisation needs to have an appropriate organisational structure, which will for example determine the flow of responsibility and reporting procedures.

The organisational structure is determined by: the work that needs to be done based on the goals of the organisation, the way the organisation should be governed as well as the way it should communicate internally and externally, the place the organisation is located and its age.

[Recommended for this section: Leadership position]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date:				Date:			
	Score 1				Score 2			
The organisation is legally registered and at least one person in the organisation is in charge of ensuring all legal requirements are met accordingly to the status of the organisation and laws of the country	5	4	1	0	5	4	1	0
Before scoring: Have a chat with the person in charge of legal issues to double check all is in order and make sure all legal requirements are known by relevant staff and stakeholders (i.e. labour act, access to information act etc.)								
The organisation has a constitution that has detailed and clear sections on: The type of organisation, its purpose, its objectives, the membership of your organisation, structures and main procedures of decision-making, the roles, rights and responsibilities of people holding specific positions and of the different structures, How the finances and assets of the organisation are controlled, Financial year and audit process, process to close down the organisation.	5	4	1	0	5	4	1	0
Before scoring: Ensure that constitution contains all requirements listed in the statement above.								
There are procedures and processes to ensure the rightful and efficient application of all sections/structures listed in the constitution (i.e reporting procedures, decision making etc)	5	4	1	0	5	4	1	0
Before scoring: Check the constitution and for each point ask yourself how it is currently put in application, is a procedure or process needed and if yes, does it exist or not at the moment.								
In our organization, the organisational structure, as defined by the constitution, is known and understood by the relevant staff. Responsibilities are clearly assigned to each position, each employee knows what they do, whom they report to or who reports to them.	5	4	1	0	5	4	1	0
Before scoring: Ask some of the staff members if they know the organisational structure as well as roles and responsibilities and evaluate the results.								
The relationships among the position in our organisation are illustrated graphically in an organizational chart or organigram.	5	4	1	0	5	4	1	0
Before scoring: Ensure the organisation has an organigram up to date and accessible to all.								
Total score for Organisational Structure								

Name, position and signature of the person who is responsible for this section:

Organisational Governance

The governance of an entity is the way the rules, norms and actions are produced, sustained, regulated and held accountable. Governance may take many forms. Governance promotes community and stakeholder confidence, leads to better decisions, helps organizations meet their legislative responsibilities, supports ethical decision making, enhances relationships with stakeholders, ensures transparency and accountability for the use of public funds. Good governance ensures both programme and financial sustainability.

As a non-profit, it's about how your organisation is led by your governing body such as a Board, it includes establishing policies and monitoring of their proper implementation as well as monitoring the activities of the organisation and how it spends its money. Governance is a challenge for many non-profit organisations where your main aim is public service not financial gain. It is difficult to find board members with the necessary skills who will volunteer their time and regularly attend meetings.

[Recommended for this section: Board member/Director position]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date:				Date:			
	Score 1				Score 2			
All governance bodies know the separation between their roles and responsibilities.	5	4	1	0	5	4	1	0
Before scoring: Ask some of your board members the difference of roles and responsibilities between the CEO and the board and see the result.								
There is at least one monthly management meetings and if applicable, annual AGM.	5	4	1	0	5	4	1	0
Before scoring: No comment, the statement speaks by itself.								
Your board is meeting at least twice annually with the director and limited staff members (optional: senior executive management or staff member relevant to report or answer questions). Board members are not paid nor receive any benefit from their position/services.	5	4	1	0	5	4	1	0
Before scoring: Check if you meet the minimum requirements in the statement above.								
Board members receive the information they need before (minimum 3 weeks prior) and after (minutes) meetings. Management reports are submitted to the board quarterly.	5	4	1	0	5	4	1	0
Before scoring: Check when preparative information is sent to the board before meetings and when management reports are submitted. Check that minutes are always taken and communicated with the board after the meeting.								
The board is regularly and formally evaluated, evaluations lead to meaningful board development and improvement in governance.	5	4	1	0	5	4	1	0
Before scoring: Check when the last board's evaluation was and what has come out of it.								
The organisation has policies that guarantee good governance and cover at least: conflict of interest, whistle-blower protection, executive compensations, mismanagement, sensitivity to cultural difference, public reporting and transparency, document retention and destruction, board governance.	5	4	1	0	5	4	1	0
Before scoring: Ensure your organisation has a set of policies that ensure good governance and compare with the list above to see if it includes the minimum requirements.								
Annual Report and Audited Financial Statements are publicised annually.	5	4	1	0	5	4	1	0
Before scoring: No comment, the statement speaks by itself.								
The organisation has a code of conduct that is shared and known by the entire staff and all stakeholders, including the board.	5	4	1	0	5	4	1	0
Before scoring: Ensure you have a code of conduct and whether all staff members, board members and stake holders have knowledge or access to it.								
Total Score for Organisational Governance								

Name, position and signature of the person who is responsible for this section:

Financial Management

Financial Management is the process of managing the financial resources, including accounting and financial reporting, planning, budgeting, collecting accounts receivable, risk management, and insurance for a business. The financial management system for an organisation or small business includes both how you are financing it as well as how you manage the money in the organisation.

There is no need for "before scoring" indications in this section. The statements below shall speak for themselves and be very simple to evaluate. You can also find all of them with more details in Mango Health Check.

[Recommended for this section: Financial Manager]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date: Score 1				Date: Score 2			
Planning and Budgeting: Budgeting is about working out how much your planned activities are likely to cost. It is important for finances and programmes to work on it together to ensure good cooperation and coordination. Always monitor actual spending against expected spending and update project managers accordingly.								
Budgets are prepared in good time for all the costs of running the organisation.	5	4	1	0	5	4	1	0
Both finance and programme staffs are involved in setting budgets.	5	4	1	0	5	4	1	0
Project budgets are based on the cost of planned activities before they start.	5	4	1	0	5	4	1	0
Budget worksheets include explanatory notes and clear calculations.	5	4	1	0	5	4	1	0
A separate budget is prepared for core costs (overheads) with a specific budget holder.	5	4	1	0	5	4	1	0
Organisational budgets are approved by the Board of Trustees/Directors.	5	4	1	0	5	4	1	0
A named individual (budget holder) is responsible for implementing and managing each budget.	5	4	1	0	5	4	1	0
Budget codes match (or correspond to) accounting codes.	5	4	1	0	5	4	1	0
All planned operational costs are adequately funded.	5	4	1	0	5	4	1	0
A cash flow forecast is prepared every month.	5	4	1	0	5	4	1	0
Basic accounting systems: there should always be evidence that a specific transaction has taken place: receipt, invoice or sign sheets etc. Every entry in the cashbook is then referenced to this supporting document. Reconciliations ensure you check the accuracy of the accounting cashbooks at the end of each month against bank statement balance and a physical cash count of the petty cash.								
Every payment made has a supporting document providing evidence.	5	4	1	0	5	4	1	0
All cash or cheques received are recorded on pre-numbered carbon copy receipts (if NGO does not receive cash or cheques score 5)	5	4	1	0	5	4	1	0
All payments and receipts are recorded in cashbooks (date, description, amount)	5	4	1	0	5	4	1	0
There is a separate cashbook for each bank and cash account	5	4	1	0	5	4	1	0
Every entry in the cashbooks is cross referenced to a supporting document	5	4	1	0	5	4	1	0
All cashbooks are updated at least once per month	5	4	1	0	5	4	1	0
All cashbooks are written neatly in permanent ink or on computer	5	4	1	0	5	4	1	0
A standard Chart of Accounts is used to code (or classify) each transaction in the cashbooks	5	4	1	0	5	4	1	0
Transactions are also classified by project or donor using a standard list of "cost centres"	5	4	1	0	5	4	1	0
A bank reconciliation is done each month, for every bank account	5	4	1	0	5	4	1	0
A cash count reconciliation is witnessed and recorded each month	5	4	1	0	5	4	1	0
The organisation keeps track of amounts owed to others (eg supplies) and owed by others (eg staff).	5	4	1	0	5	4	1	0
Financial Reporting: The Board need financial reports to oversee the finances of the organisation, managers to monitor projects and make decisions and donor agencies to check the use of the money and often as a condition for further funding. Monthly financial reports should include a report on income and expenditure as well as a budget monitoring report that project managers can use to use the money efficiently and effectively. Financial reports would have different format depending on their use, eg donor formats as per grant agreements, standard formats for annual								

audited accounts, accessible formats for beneficiaries, user friendly formats for managers.								
The board reviews financial reports every quarter.	5	4	1	0	5	4	1	0
Senior managers discuss financial reports at least once every three months	5	4	1	0	5	4	1	0
Reports include details of cash and bank balances, amounts due (eg from staff) and owed (eg to suppliers).	5	4	1	0	5	4	1	0
Budget holders receive budget monitoring reports every month	5	4	1	0	5	4	1	0
Budget monitoring reports include explanations and comments about differences	5	4	1	0	5	4	1	0
Financial reports are used to help make decisions	5	4	1	0	5	4	1	0
Financial information is shared with beneficiaries at least once per year, in an accessible way.	5	4	1	0	5	4	1	0
Annual audits are up-to-date (signed within 7 months of the year end)	5	4	1	0	5	4	1	0
Internal Controls: Organisations, especially NGOs use a lot of different internal controls to make sure: assets are safeguarded, accounting records are accurate, fraud and errors are prevented and detected, staffs are protected.								
Cash is kept safely in a locked cashbox or safe, in the custody of one individual	5	4	1	0	5	4	1	0
All cash received is banked intact, ie without any being spent (if no cash is received, score 5)	5	4	1	0	5	4	1	0
All cheques are signed by at least two authorised signatories	5	4	1	0	5	4	1	0
Cheques are signed only when all the details have been properly filled in (i.e no signatories ever sign blank cheques)	5	4	1	0	5	4	1	0
Bank reconciliations are checked by someone who did not prepare them	5	4	1	0	5	4	1	0
There is a written policy detailing who can authorise expenditure of different types of value	5	4	1	0	5	4	1	0
All transactions are properly authorised	5	4	1	0	5	4	1	0
Cash payments are authorised by someone other than the cashier	5	4	1	0	5	4	1	0
Different steps in the procurement process (eg ordering, receiving and paying) are shared among different people	5	4	1	0	5	4	1	0
Expense claims for staff advances are checked by the same person who authorized the advance	5	4	1	0	5	4	1	0
Staff salaries (including advances and loan deductions) are checked each month by a senior manager	5	4	1	0	5	4	1	0
Statutory deductions (eg payroll taxes) are properly made and paid on time	5	4	1	0	5	4	1	0
All fixed assets (eg vehicles, computers, equipment) owned by the NGO are insured and controlled using a fixed assets register	5	4	1	0	5	4	1	0
There is an approved policies and procedures manual in place which is relevant to the organisation, known, read and signed by all staff members.	5	4	1	0	5	4	1	0
A properly registered audit firm is selected by the trustees	5	4	1	0	5	4	1	0
Grant Management: Donors tend to fund specific projects with specific budgets which form part of the grant agreement, important document to put in place the amounts and timings of funds to be transferred. The agreement may also contain grant conditions, including procurement rules and reporting requirements. Programme and Finance staffs need to ensure consistency between the narrative and financial reports. When working with several donors, it is very important to keep track of which donor is funding which project or part of a project.								
There is a signed grant agreement in place for each grant received	5	4	1	0	5	4	1	0
Senior Managers check the grant conditions are reasonable before signing agreements	5	4	1	0	5	4	1	0
Grant conditions on procurement are known by finance staff, budget holders and procurement officer(s)	5	4	1	0	5	4	1	0
There is compliance with the terms and conditions in grant agreements	5	4	1	0	5	4	1	0
Donors receive financial reports in the right format and on time	5	4	1	0	5	4	1	0
Donor financial and narrative reports are consistent and clearly linked to each other	5	4	1	0	5	4	1	0
Donor funds are kept for the activities they are meant for and never "borrowed" for other activities	5	4	1	0	5	4	1	0
Total score for Financial Management								

Name, position and signature of the person who is responsible for this section:

Human Resources

Human Resource Management is a planned approach to managing people effectively for performance. It aims to establish a more open, flexible and caring management style so that staff will be motivated, developed and managed in a way that they can give of their best to support departments missions. Good practices are instrumental in helping achieve departmental objectives and enhance productivity.

[Recommended for this section: Human Resources Manager or person in charge of HR]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date: Score 1				Date: Score 2			
Our organisation has a staff member dedicated to HR management as well as a HR plan in place that projects its short to long term human resource needs in line with its strategy.	5	4	1	0	5	4	1	0
Before scoring: Ensure whoever is in charge of HR in your organisation has the time and skills to do so. Ensure there is an HR plan and that it does fit the description above.								
Our organisation manages people effectively through an open Performance Management System (Or Appraisal System) with regular reviews. This system calls for individual objectives tied to organisational objectives and supported by regular coaching and developing staff on the job.	5	4	1	0	5	4	1	0
Before scoring: Ensure your organisation has a PMS and if it does, ensure it fits the description above.								
Our organisation enhances staff's competencies to perform better through effectively training people to achieve objectives and results, especially if their duties or responsibilities evolve.	5	4	1	0	5	4	1	0
Before scoring: Check if staff members are asked regularly and formally what are their training needs. Check if those requests have been answered or planned for lately.								
The organisation promotes and supports team cohesions through activities, regular meetings and communication systems.	5	4	1	0	5	4	1	0
Before scoring: Try to objectively evaluate the level of cohesion among your team (exercises can be done too) and accordingly look at what is in place to ensure best team work possible: what are the most regular ways for your staff to meet and debrief, team building activities, collaborations between programmes, shared information etc.								
All staff is skilled for their own job description	5	4	1	0	5	4	1	0
Before scoring: Take each job description and compare it with the profile of the employee in this position, verify this employee has the relevant skills and if not, check if the employee could receive training or rather have its job description reviewed.								
The management ensures strategies are in place to capture and retain talents and skills.	5	4	1	0	5	4	1	0
Before scoring: Skills/Talent retention is extremely important, evaluate the turnover of your staff in your organisation and try to list the reasons accordingly. The attractiveness of your organisation depends not only on fair remunerations but working conditions as a whole. You can also ask your staff what their suggestions are.								
Job descriptions are clearly defined, regularly updated or reviewed and available to the entire staff.	5	4	1	0	5	4	1	0
Before scoring: Ensure job descriptions are very clear and known not only of the concerned employees but accessible by all.								
Staff members have opportunities to advance through career planning and potential increases in some cases.	5	4	1	0	5	4	1	0
Before scoring: This is part of the retention strategy, it should be the minimum in place. Ensure your organisation structure and systems give your staff perspectives to grow (something to look forward to) might it be with promotions in status or in compensations.								
Total score for Human Resources								

Name, position and signature of the person who is responsible for this section:

Monitoring and Evaluation

Monitoring and evaluation (M&E) plans enable programs to make databased decisions (to continually improve programme performance) and to provide funding agencies with evidence-based program outcomes. While reporting requirements are often regarded as a burden on activities in the population and health sector, routine project monitoring can be designed to meet the needs of both local project managers and funding agencies.

Evaluation is the application of rational and researched technique to improve the ways programmes are conducted, from the earliest stages of design through development and implementation. Evaluation includes monitoring and impact assessment. Monitoring determines how well the planned activity is carried out at different levels and tracks change that occurs over time. Impact assessment measures the extent to which the chance can be attributed to the program intervention (cause and effect).

[Recommended for this section: Leadership position]

Fill the date for score 1 and for score 2 (when you score again, at least 6 months later)	Date: Score 1				Date: Score 2			
Our organisation has an M&E plan for each programme, focusing on efficiency and cost-effectiveness.	5	4	1	0	5	4	1	0
Before scoring: Ensure each programme has an M&E plan or is part of an organisational plan. Ensure this planning process makes the best use of the resources and skills already available before outsourcing.								
It is common practice in our organisation to develop M&E plans through brainstorming session to: 1. identify priorities according to strategic plans and workplans 2. Identify already existing data resources 3. Decide on data collection methods and techniques.	5	4	1	0	5	4	1	0
Before scoring: Check if your organisation has regular meetings (at least when planning the year ahead) about M&E and if the matters described above are being discussed collectively.								
Each M&E plan has realistic indicators and targets set with regular reviewing and updating.	5	4	1	0	5	4	1	0
Before scoring: Ensure all M&E plans have SMART indicators and targets that will enable proper and efficient evaluation.								
Each M&E plan is assigned to a specific person responsible for its implementation.	5	4	1	0	5	4	1	0
Before scoring: Ensure each plan's implementation and success is the responsibility of a designated staff member.								
The results and data collected through M&E plan are widely disseminated and taken into consideration by leadership for decision making.	5	4	1	0	5	4	1	0
Before scoring: It is important to use the results of the M&E process to make the best decisions for the programme but also to share with stakeholders: beneficiaries, funders and general public if relevant.								
Someone is assigned to collect and record documentation for each project.	5	4	1	0	5	4	1	0
Before scoring: Documentation is very important for multiple purposes, ensure you have a staff member responsible to collect the documentation recorded by each programme. Make sure programme always record important activities or information, having a system in place to do so is recommended.								
Total score for Monitoring and Evaluation								

Name, position and signature of the person who is responsible for this section:

INTERPRETING YOUR SCORE

Record your score for each section in this table. Then compare it to the columns on the right and ring or shade the appropriate risk assessment for each section. Finally add up your total score and see the advice below.

Section	Your Score 1	Your Score 2	High Risk	Medium Risk	Low Risk
Specificities of the Arts and Culture Sector			0-6	7-12	12-15
Organisational Statements and Strategic Planning			0-20	21-35	36-40
Organisational Structure			0-11	12-19	20-25
Organisational Governance			0-20	21-35	36-40
Financial Management			0-150	151-240	241-300
Planning and Budgeting			*0-25*	*26-40*	*41-50*
Basic Accounting Systems			*0-30*	*31-50*	*51-60*
Financial Reporting			*0-20*	*21-35*	*36-40*
Internal Controls			*0-40*	*41-60*	*61-75*
Grant Management			*0-15*	*16-25*	*26-35*
Human Resources			0-20	21-35	36-40
Monitoring and Evaluation			0-15	16-21	22-30
Total Score			0-242	243-397	398-490

Now that you have your score and been through the Health Check, if you have not done it yet, it is time to ask: what can we do about it? How do we improve our health?

Difference between score 1 and score 2: When evaluating score 1, try in the next 6 months to put in place the improvements that will allow you to upgrade to the upper result's category.

Your score is over 398
Well done! Your organisation is healthy. The risk of not being able to complete your work, are very low because your organisation seems to function effectively. But do also consider your score in each section: a healthy arts organisation requires strengths in all 7 main areas.

Your score is between 243 and 397
Not bad! There is clearly some good practices in place, but still plenty of room for improvement. There is a risk that organisational problems will prevent you from doing your work efficiently and competitively. The lowest scoring sections require immediate attention from leadership and managers.

Your score is less than 242
Work to be done! You have serious problems. Your organisation is not in good health. There is a high risk that you will face problems in the near future, donors may even withdraw their financial support. Managers and Boardmembers/Directors should meet urgently to discuss how the situation can be improved. You should consider calling in assistance as soon as possible. This must be dealt with right now.

ADDITIONAL RESOURCES

Useful websites for resources and toolkits:

- http://www.inyathelo.org.za/ including: *Attracting Support Kit for NPO's*, 2nd Edition, 2013, Inyathelo: The South African Institute for Advancement.
- http://www.mangi.org.uk including: *Mango Health Check: How healthy is financial management in your not-for-profit organisation?* By Mango, Version 3 of 2009:
- http://www.arterialnetwork.org including: Arts Fundraising toolkit, Network and Advocacy toolkit, Arts Marketing toolkit and Project Management for the Arts toolkit.
- http://culturaldevelopment.co.za/

SHIRIKA programme:

Workshops will be rolled out in 6 African countries in 2016. For more information and call out for SHIRIKA trainings check out Arterial Network (opportunities/news) website or Facebook page. This Health Check must be submitted to apply for training opportunities.

The SHIRIKA toolkit will be available online in 2017, for updates subscribe to Arterial Network newsletter or follow us on social media.

Sources utilized for SHIRIKA Health Check:
- Arts Advocacy & Networking Toolkit, by Arterial Network, 2014: http://www.arterialnetwork.org/resources/our_publications/art-advocacy-and-networking-toolkit
- *Attracting Support Kit for NPO's*, 2nd Edition, 2013, Inyathelo: The South African Institute for Advancement.
- *Mango Health Check: How healthy is financial management in your not-for-profit organisation?* By Mango, Version 3 of 2009: http://www.mango.org.uk/guide/healthcheck
- *Organizational Structure* by Business Dictionary: http://www.businessdictionary.com/definition/organizational-structure.html
- *Organizational Structure* by Reference for Business: http://www.referenceforbusiness.com/management/Ob-Or/Organizational-Structure.html
- *Constitutions for Non-Profit Organisations* by Education & Training Unit (ETU): http://www.etu.org.za/toolbox/docs/building/const.html#1
- *Mission and Vision Statements: Unleashing the Power of Purpose*, by the Mind Tools Editorial Team: https://www.mindtools.com/pages/article/newLDR_90.htm
- *Key Governance Policies*, by Connecticut Association of Nonprofits: http://www.ctnonprofits.org/resources/governance
- Should Staff Contact with the Board be restricted? By Jan Masaoka, Blue Avocado: http://www.blueavocado.org/content/should-staff-contact-board-be-restricted
- *Financial Management,* by Small Business Notes: http://www.smallbusinessnotes.com/business-finances/financial-management/#ixzz490ohRJPE
- *Human Resource Management Good Practices*, by Civil Service Bureau, Government of Hong Kong: http://www.csb.gov.hk/hkgcsb/hrm/e-good-practices/e-gp.htm
- *Monitoring & Evaluation Best practices* by Doctor Ghaiath Hussein, Linkedin, October 2010: www.slideshare.net/ghaiath/monitoringevaluation-best-practices
- *Best Practices in Monitoring and Evaluation: Lessons from the USAID Turkey Population Program* by Jill Mathis, Pinar Senlet, Ersin Topcuoglu, Rifat Kose and Amy Tsui, October 2001: file:///C:/Users/Main_2/Downloads/sr-01-11.pdf