



Use this checklist as starting place for evaluation of your community group or association. Consider how your group/association/board/committee would answer each question. Share your thoughts with other members of your group, and/or discuss at a board meeting. Reach out for help with any of these categories, or for a general review.

General Organization	YES	NO	N/A
Do you have a vision and/or mission statement?			
Are you registered with Joint Stocks?			
Do you know your renewal date for Registry of Joint Stocks and who the Recognized Agent is? (This person receives reminder notice).			
Do you have a strategic plan?			
Do you fall under the umbrella of another recognized agency such as a provincial governing body? Are you aware of annual reporting or financial commitments?			

It is important that your organization knows its purpose and its direction and also that it is a registered entity. Joint Stocks not only provides protection for your association, but is also a requirement for most funding programs. We can help you with Joint Stocks application and vision/mission or strategic plan!

Finances	YES	NO	N/A
Do you have a bank account with multiple signing authorities?			
Do you operate from a board approved budget?			
Are year-end financial statements prepared and reviewed?			
Do you make use of available grant programs?			
Are current fundraising methods and/or membership fees producing revenue needed?			

Responsible financial procedures and appropriate checks and balances are extremely important for an organization's continued success. If you have questions about turning a No into a Yes don't hesitate to contact us for help.

Operations & Policy/Procedures	YES	NO	N/A
Have you reviewed your bylaws in the last 3 years?			
Do you have adequate insurance? Directors & Officers? Commercial/Liability?			
Are contracts in place with partners, user groups, etc?			
Do you keep meeting minutes and documentation?			
Are roles and responsibilities defined? Do you have position descriptions?			

Insurance, bylaws, and meeting minutes are crucial to your organization's operation, safety, and are key parts of succession planning as well! Have questions about insurance or policies and procedures? We can help!

Community & Capacity	YES	NO	N/A
Do you have a website? Is it up to date?			
Do you have a social media presence?			
Do you have the volunteers you need?			
Do you actively recruit for volunteers and board/committee members?			
Does your organization engage with community partners?			

It is easy to focus on operations and priorities of your association. Don't forget to engage the community with relevant and up to date content!