



The ACRE Standard

4th Edition

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Taster



Department
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The ACRE Standard

1. Introduction

ACRE (Action with Communities in Rural England) is a national charity whose purpose is to support sustainable rural community development. ACRE and its member Rural Community Councils make up the Rural Community Action Network (RCAN). ACRE produced the Good Practice Quality Standard (the ACRE Standard) as part of a national improvement strategy for the Network. The Standard is supported by DEFRA and endorsed by the Charity Commission at Levels 1, 2 and 3 (the highest level).

The ACRE Standard covers 9 areas of good practice in organisational management and service delivery. Each of these contains a number of requirements and is defined at 3 levels. These are:

- Level 1 – basic requirements that should be met as a matter of priority. These include the minimum legal requirements for a charity
- Level 2 – more advanced requirements
- Level 3 – an on-going requirement to ensure that Level 1 and 2 requirements continue to be implemented and that each of the 9 areas are regularly reviewed to ensure continued improvement and development.

A Peer Review process has been developed that provides external validation of whether the requirements of the Standard are being met. Accreditation reviews must take place at least every 4 years.

This document contains:

- Guidance on self-assessment
- The 9 Organisational Standards
- A self-assessment sheet for each Standard
- An action plan sheet for each Standard
- A list of the key documents required by the Standard
- Definitions of terms used in the Standard.

2. Guidance on self-assessment

2.1 Overview

In order to check whether you are meeting the individual requirements of the Standard, you will have to carry out an assessment of your organisation.

This 'self-assessment' should ideally involve a small team of people from within your organisation. They should look for evidence of whether the requirements are being met.

If a requirement is not being met, you should work out what you have to do to meet it, and make sure that you take this action.

2.2 Planning the self assessment

Before you begin the self-assessment process, you need to:

- Make sure that trustees and managers are committed to using the ACRE Standard to improve your organisation.
- Tell staff that you are using the ACRE Standard to help you improve what you do and the way that you do it; that you will welcome suggestions for improvements from them; and that it may involve changes in the way that things are done.
- Plan how you are going to do it. It is probably best to set up a small team to manage the process. This could consist of a group of people (4-6 may be a good number depending on the size of your organisation. This group could include a trustee, your lead person on quality, an officer or project worker, a manager and a front line member of staff. Their job will be to confirm that there is suitable evidence of how each of the requirements is being met.
- The actual process of evidence gathering and involving other members of staff and trustees is described in paragraph 2.3.
- Decide if you are going to look at the Standard one level at a time. This is probably the easiest way, rather than all levels at once. Remember that, for the accreditation review, you must pass Level 1 in order to pass Level 2.
- Set a time frame for carrying it out.
- Give your self-assessment team and other staff involved in the process the support and time they need to meet these targets – do not just add it on top of their normal workload!

2.3 Carrying out the self-assessment

The team should meet and go through each of the 9 Standards at the agreed level(s). For each requirement they should ask:

- Do we have evidence to give us confidence that we meet the requirement?
- If not, what do we need to do to provide that evidence?

There are various ways of doing this:

- The team may wish to look for all the evidence themselves, although this could be quite onerous
- You may want to expand the team to include other people to look at specific areas where they have expertise
- You could set up working groups that each take on an area of the Standard. They could involve a cross-section of staff, trustees and other volunteers where appropriate; or using a Finance Committee to look at the Financial Management Standard; or any other mechanism that involves people from different parts of the organisation. These groups then report back their findings to the team.

At the end of the evidence gathering process, the results of what you have found should be recorded. There is a sheet after each area of the Standard for you to record where you are in relation to meeting the requirements. You should tick:

- 'No' if you can provide no evidence that you are meeting that requirement
- 'Partly' if you are part of the way there
- 'Yes' if you feel that you fully meet the requirement and can evidence this.

Many of the requirements are straightforward, but some will require you to think and come to a judgment about whether you feel that you are doing enough. You can always improve but the Standard does not look for perfection, so do not be too critical of yourself.

On the other hand, do not be too complacent. You should apply the test of reasonableness to your answers. The process of self-assessment is meant to make you think, rather than just automatically tick boxes.

For those requirements where you have more to do, the second sheet after each quality area can be used. This is in two parts.

The 'To be done' part should be used to record:

- What action needs to be taken, such as 'produce a petty cash procedure'
- What resources you need to do it (usually time!)
- When you will do it by
- Who will do it.

The 'Check it was done' part is filled in when the relevant deadline for action has been reached. You should record:

- The date of the review of the action
- Who carried out the review
- The result of the review – which hopefully will be that you have achieved your objective.

Once all the actions have been undertaken, you can go back to your first sheet and tick all the boxes as 'met'.

2.4 Level 3

Level 3 is different from Levels 1 and 2. The first two levels require you to put systems, procedures, documents, etc in place and to make sure that these are being properly implemented or followed.

Level 3 is designed to check on two things related to the previous levels:

- (i) That you continue to implement the requirements of Levels 1 and 2.
- (ii) That you have looked at each of the 9 areas in the ACRE Standard to see if further improvement or development could take place. Any improvements that have been made should be recorded and evidenced during the next accreditation assessment.

- 3.** The ACRE Standard should be a vital tool for demonstrating to funders that your organisation is well-managed and capable of delivering relevant, high quality services for the communities you serve.

Edition 4 of the ACRE Standard

Charity Commission mandatory assessment requirements

When endorsing quality standards and accreditation processes, the Charity Commission has defined the assessment of some of the requirements as mandatory. Accreditation assessments must check that these mandatory elements are being effectively implemented. **All mandatory requirements must be met for the Standard as a whole to be met.**

For ease of identification, the Charity Commission mandatory assessment elements are marked **(M)** within the 4th edition of the ACRE Standard.

Standard 1 – Business Planning

Business planning involves having defined strategies, aims and objectives for the organisation, and putting this into practice through agreed policies and plans. You need to carry out business planning annually and over the medium term (usually 3 years) to define how you are going to meet your aims and objectives.

Level 1 – Basic Requirements

1. The Board ensures that all trustees understand that they have overall responsibility for the management of the charity **(M)**
2. Your mission, values, aims and objectives are defined, documented and communicated to relevant stakeholders (e.g. trustees and staff)
3. There is an annual planning process and an annual business plan is produced **(M)**
4. The organisation has a clear mission and strategies, which are regularly reviewed
5. Services provided clearly relate to the stated charitable purposes **(M)**
6. Services provided clearly relate to aims and objectives **(M)**
7. The organisation is independent. It recognizes that it exists to pursue its own purposes and not those of any other body **(M)**
8. You know who your stakeholders are, identify their needs, and feed these into the planning process
9. Stakeholders are provided with details of the full range and type of services provided
10. Key output targets are contained in the business plan
11. Performance against the annual business plan is monitored. **(M)**

Level 2 – Advanced Requirements

1. Long term strategic planning is carried out, and a medium term integrated financial and business plan produced, which relates to your aims, mission, values and objectives **(M)**
2. Outcome measures are defined for key services: these must be documented and linked to the RCC's objectives **(M)**
3. Relevant stakeholders are involved in strategic and annual planning
4. Strategic planning identifies future staffing and other resource requirements. **(M)**

Level 3 – Continued Implementation and Improvement

1. You continue to implement the requirements of Levels 1 & 2
2. The effectiveness of the business planning process is reviewed between assessments, to ensure continued improvement and development.

A full copy of the ACRE Standard is available for purchase from ACRE at £50.00 per copy including P&P. Please download the Publications Order Form from our website and return it to ACRE with your payment.

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