

KNOW YOUR COOPERATIVE

PROSPECT:

ASSESSED BY:

DATE:

At Uhuru Institute we believe that a vital part of our service is to undertake a situational analysis which will allow us to:

- Appraise the cooperative's holistic context
- Identify and prioritise a cooperative's needs and goals
- Assist us in designing appropriate solutions that satisfy the needs and goals of the cooperative



A. BASIC COOPERATIVE INFORMATION

Legal status: _____

Date of Probationary Registration:

Probationary Registration Number:

Date of Permanent Registration:

Permanent Registration Number:

Have you changed names before? YES NO

If yes, what was your old name: _____

Give reasons for the change in name: _____

Physical Location: _____

District: _____

Subcounty: _____

Parish: _____

Village: _____

Trading Center: _____

Contact Person: _____

Address: _____

Tel(Office/Mobile): _____

Email: _____

Web: _____



B. CORPORATE INFORMATION

Vision: _____

Mission: _____

What are the key activities of your cooperative?

Does your business have a direct impact on your member's household income? YES NO

Are there plans to increase your members' household income? YES NO

If yes, list at least 4 initiatives your cooperative is implementing?

If your cooperative undertakes a single business type, are there plans of becoming multipurpose?

YES NO

If yes, why? _____

Does your cooperative profile its members, and if yes what tools does it use and how often does it perform this exercise?

No. of Shareholders/Members:

No. of active members: Male Female

No. of youth members (18-30 years):

What are your products and services: _____

State your share capital value:

State your annual turnover:

Do you own any assets? YES NO

If yes, please list them together with their value _____

Who finances your business and by what proportion?

Do you have a bank account? YES NO

Do you operate any credit/ lending facilities to members? YES NO

If yes, how long has it run? _____

GOVERNANCE AND MANAGEMENT				
What is the quorum of your AGM?				
When was the last time your cooperative held an AGM?				
How many members attended the AGM above?				
Composition of the Board / Executive Committee	NAMES	LAST ELECTION DATE	PROFESSION	INSTITUTIONAL AFFILIATION
Composition of the Supervisory Committee				
Composition of the Vetting Committee				

Do you have sub-committees? If yes, list them below.

C. TRAINING AND BUSINESS DEVELOPMENT

TRAINING HISTORY		
	TRAINING TOPIC/ SUBJECT (e.g. how to conduct an AGM)	TRAINING PROVIDER
Mention the trainings your cooperative members have received in the past 3 years		
Mention how your cooperative benefitted from the trainings listed above?		
How do the previous trainers follow up on your cooperative to ensure impact?		
CURRENT TRAINING NEEDS		
What other areas of training would you consider important to your cooperative?		
Does your cooperative have a budget for training? If no, how do you expect to meet the cost of training your members.		
Do you have any training materials that you refer to? If yes please list their names and providers		
Do you have a performance & monitoring tool to track the impact of the training on members and the Cooperative? and if you dont, do you need one?		

PRODUCTS & SERVICES	
What are your products or services and what makes them competitive?	
BUSINESS AND STRATEGIC PLANNING	
Does your cooperative have a strategic plan ? If no, do you need support from Uhuru Institute to develop one ?	
Does your cooperative have a business plan? If no, would you like to hire Uhuru Institute to help you develop one?	
RECORD KEEPING	
Does your cooperative keep records? If so, mention the categories of records kept?	
If you keep records in hard copy, mention the documents your cooperative uses for record keeping	
If your cooperative keeps record in soft copy, mention the applications (excel, quick books you are using)	
ACCOUNTING & FINANCE	
Does your institution hire a qualified accountant? If yes, what qualification does he / she have?	
Does your accountant produce financial reports? If so, mention the types of reports and the frequency of production	
TAXATION & AUDIT	
Mention if you cooperative undertakes annual audits and if so name your current auditors and state whether you are happy with the quality of audit?	

TAXATION & AUDIT (cont'd)		
If your cooperative is not audited please explain why and suggest what help Uhuru Institute can offer you in ensuring that you are audited.		
Does your cooperative file tax returns to Uganda Revenue Authority? If not, why?		
Suggest what the Uhuru Institute can do to have the taxes filed to avoid non compliance.		
Does your Cooperative file returns to the Registrar Cooperatives ?		
Did your Cooperative secure maximum liability from the AGM for the current year? If yes how much ? and if no gives reasons		
POLICIES AND GUIDELINES		
List the organisational policies that your cooperative uses to guide its operation	Governance	
	Credit	
	Procurement	
	Accounting and Finance	
	Bulking	
	Quality control	
	Safety and health	
	Human Resource	
	Operations: - <ul style="list-style-type: none"> ■ ICT ■ Disaster ■ Recovery Plan ■ Risk management ■ Asset Management ■ Communication & Marketing 	
In case your cooperative has no policies and procedures, would you consider working with the Uhuru Institute to develop them? If so what policies would you like to develop now		

FOR OFFICIAL USE ONLY

Reviewed by: _____ Position: _____ Date: _____

Notes: _____

#GeneratingWealthTogether



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