

**Northern Berkshire United Way
2009 Member Agency Self-Evaluation Worksheet**

	AGENCY: _____ Date: _____	Excellent	Good	Fair or Not Applicable	Unsatisfactory	Inadequate--Failed
	Evaluation Component					
1	Corporate Documents: e.g. Mission Statement, By-laws, Personnel Policies, Non-discrimination statement., Certification for Solicitation, Tax Status letter {501C3}, etc.					
2	Strategic Plan					
3	Active, strong board (Regular meetings & minutes; Approve Strategic Plan, approve annual budget and audit, Review CEO; review annual goals/progress, strong committees)					
4	Agency sets/reviews annual goals (Goals relate to strategic plan; progress measureable)					
5	Financial Statements audited annually/reviewed monthly					
6	Financial Strength (net assets > 6-months operating budget; net assets increasing, surplus)					
7	3-Year Revenue Plan clear and credible					
8	Fundraising well-planned (100% of board are donors; clear responsibilities/opportunities pursued; major event and or mailing)					
9	Annual expenses clearly budgeted and tracked					
10	Volunteers involved appropriately, trained, satisfied					
11	Staff strength (Normal turnover, appropriate degrees/training, positions filled)					
12	Management strength (credentials, tenure, goals set/tracked; programs tracked/evaluated, "well-run" agency)					
13	Collaborations (Degree to which agency appropriately seeks and uses collaborations and avoids inefficient overlaps and/or turf issues)					
14	Services/programs clearly visible and accessible					
15	Client participation/use of services					
16	Client gains/progress —short-term					
17	Client outcomes for longer-term (3-5 years and more)					
18	Town-by-town tracking of clients					
19	Service/program activity/volume is balanced with the available resources					
20	Agency/programs are cost-effective (judgment has clear basis—external data review)					
	Total Number of ratings of each level Multiplied by point value	X 4	X 3	X 2	X 1	X 0
	Evaluation Totals: Sum of all: Sub-Total Each Level:					

Guidelines on evaluations: **Excellent**--Current level/practice easily exceeds relevant standards; very little room for improvement. **Good**—Effective/adequate in nearly every sense, though clearly some room for improvement. **Fair**—Not entirely proud of this one, some clear short-comings, but mostly pretty good. (**Not Applicable**—this evaluation component does not and should not apply to our agency). **Unsatisfactory**—Though there are some positives here, we are unhappy in this area and need to make significant improvements. **Failed/Inadequate**—If broadly known/visible, this would be an embarrassment to us, and we need a redesign/rethink and/or a huge turn-around.

For any "Excellent" or "Failed" evaluations, agencies are requested to attach a 2-3 sentence commentary.

Worksheet Approved: _____, Executive Director; Date _____

Approved: _____, Board President; Date: _____

