

**UNITED WAY OF AMERICA  
STANDARDS OF EXCELLENCE  
SELF-ASSESSMENT TOOL  
INTRODUCTION**

**PURPOSE**

The Self-Assessment Tool measures local perception of your United Way's performance relative to the 34 standards outlined in the *United Way Standards of Excellence*. The *Standards* were developed in 2005 through a partnership between United Way of America, the National Professional Council and representatives from over 75 local United Ways. This developmental tool is designed to assist your United Way:

- gauge your organization's current status relative to the *Standards of Excellence*;
- assess your organization's current capacity to take on the transformational change effort necessary to become a Community Impact United Way;
- identify areas of strength where your expertise could be shared with others; and
- determine where to focus your organizational development and improvement efforts.

For the Self-Assessment process to be most effective, a strong cross-section of staff, board members, and community partners should participate.

**What are the Benefits to my United Way?**

The *Standards of Excellence* represent an ideal that local boards of directors and CEOs can aspire to based on what is feasible and appropriate in their communities. The *Standards* are universally valuable, but they are not a one-size-fits-all regimen for local United Ways because operations and community dynamics vary significantly. The Self-Assessment Tool allows your United Way to:

- conduct an easy-to-use self-assessment process through a complete packet of instructions and materials. The packet includes instructions on how to conduct the assessment to information on how to a comprehensive feedback report to review with the CEO/board/staff and utilize in planning and goal setting;
- complete the survey online by multiple participants, in an anonymous fashion and results are tabulated electronically;
- develop a basic understanding among staff, board members, and selected community partners about the nature of the United Way transformation;
- measure where your United Way is on the journey to becoming a Community Impact United Way and track progress;
- View the Standards of Excellence Self-Assessment Toolkit designed to help you know HOW to use the results; and
- fulfill a UWA membership requirement for a volunteer-led self-assessment every three years.

## **WHAT ARE THE BENEFITS TO THE UNITED WAY SYSTEM?**

Data received from local United Ways that complete the assessment will be aggregated to assist the system in:

- determining the level of progress towards transformation across the United Way system;
- identifying and developing the support and training most needed for the components and practices in the *Standards of Excellence*; and
- identifying and sharing best practices across the field.



## UNITED WAY OF AMERICA STANDARDS OF EXCELLENCE – SELF-ASSESSMENT TOOL

### OVERVIEW

The Self-Assessment is neither a pass-fail test nor a competition. It is a diagnostic. The goal of engaging in the Self-Assessment is therefore not just to attain a high ranking per se, but to gain a clearer understanding of where a local United Way is in comparison to the aspirational practices described in the *Standards*, and to pinpoint areas for improvement, addition or change.

This assessment tool has been used by over 800 United Ways from 2006-2007, including over 15,000 participants. A majority of the participants reported back that the assessment helped them better understand what it means to be a Community Impact United Way, the *Standards of Excellence*, and believe the assessment would improve their United Way's organizational performance.

The Self-Assessment Tool consists of the 34 standards themselves, each divided into four developmental stages. These stages range from (1) not applying or minimally applying the practices that embody a given standard to (4) fully excelling at all aspects of that standard. Participants each rate where they believe their United Way is currently performing. A basic familiarity with the *Standards of Excellence* and the practices that embody them, as well as an understanding of a focus on community impact to improve lives, will therefore be helpful in carrying out the Self-Assessment.

While the process is easy to follow and the online tool is easy to use, "easy" should not be confused with "quick." The Self-Assessment is a serious project and will require a serious commitment on the part of participants and those tasked with reviewing and acting on the results.

### WHO:

When a local United Way conducts the Self-Assessment, it is important to obtain individual responses from a sufficiently representative group (staff, volunteers, and community partners). **There is a minimum participation requirement based on your United Way Metro size.** This diverse set of inputs serves to improve the quality, validity, and usefulness of the diagnostic results. In selecting staff participants, it is valuable to include a diversity of levels as well as functions.

Participants should be those with the greatest knowledge of your United Way. Not everyone will have sufficient knowledge to be able to thoroughly assess all areas, but their perceptions are still valuable. In the event that a participant does not feel comfortable rating an area, a "don't know" option is available.

**If your United Way is using this process to meet the UWA membership requirement for a "volunteer-led self-assessment every three years", there must be a strong representation of board members and volunteers participating.**

## **HOW:**

- The local United Way identifies a project coordinator to manage the Self-Assessment project.
- The local United Way chooses a one-week window (Sunday to Saturday) during which the participants will respond to the online SoE Self-Assessment, and the CEO submits an online “Notice of Participation” to UWA ([https://online.unitedway.org/soe\\_selfassessment](https://online.unitedway.org/soe_selfassessment)) to indicate the dates selected. In the past, an application was required before receiving access to the materials. For assessments conducted in 2008-2010, the Notice of Participation is mainly needed to communicate any updates to the CEO and/or Project Coordinator.
- The CEO will then download the assessment materials. The complete instruction packet and web address to the survey is located on the Notice of Participation webpage. Additionally an automated email with the packet will be emailed to the CEO and coordinator.
- In the two weeks prior to the online survey, the project coordinator contacts the participants, forwarding them the survey link, instructions, and the specific dates during which they will be able to respond.
- The survey takes approximately one hour for each individual to complete and submit. It contains clear instructions for how to fill out, save, and submit the survey electronically.
- The instructions include information on how to retrieve the analysis report tabulating all the responses submitted during the agreed upon timeframe. The report will present the local United Way’s overall rankings for each of the standards.