

Standards of Excellence Self-Assessment Frequently Asked Questions

1. *I heard there are changes in the assessment process from 2006-2007 to 2008-2010?*

The main difference in the assessment process is that the 2008-2010 version is much more self-service than the past version. You will submit a non-required Notice of Participation instead of an application. Then you will have access to all the assessment materials. You will use the instructions to manage the assessment process from beginning (Sending out the survey) to end (retrieving your report).

2. *How early should I begin the process?*

We recommend you submit the Notice of Participation two months before your assessment. This will give you time to read the instructions, distribute materials, and most importantly, provide orientation to the Standards of Excellence and the Self-Assessment Tool for your group. See “What’s the best way to prepare my group for the assessment?” question #4, to learn more about the recommended orientation.

3. *Where can I submit the Notice Participation to the Self-Assessment? What will it ask?*

Find the Notice of Participation on United Way Online at:

https://online.unitedway.org/soe_selfassessment

In the Notice, the CEO will be asked to:

- Indicate the week in which your community will participate in the self-assessment. Select any Sunday to Saturday dates in the drop-down box.
- Indicate the project coordinator(s). This can be you or any other staff.

The Notice of Participation process is automatic. Under the field to the Notice, you will find a link with all the assessment materials needed. Download the materials right then and there, and save them onto your computer. Additionally, an automated email will be sent to the CEO and the coordinator(s) with the materials.

4. *How do I get copies of the SOE Self-Assessment questions?*

Go to United Way Online for information on purchasing the entire SOE books, including the *Begin Self-Assessment* booklet or downloading a PDF version. Both the booklet and the PDF version include the questions found in the assessment. Here is the link:

<https://online.unitedway.org/site/uwaservices/teampage.cfm?AID=4124&RFID=2350774> Once you click into this web link, you will need to enter your United Way User ID and password.

- Questions Only – This document includes only the questions on the Self-Assessment. This is a copy of what the participants will see when they link into the assessment
- Booklet – This document includes an introduction to the tool and the process, in addition to the assessment questions. The booklet ends with information on the report that will be produced for you upon completion of the assessment and ideas for how to further analyze and use the results.

The questions are provided as a reference resource only. Trying to administer the Self-Assessment manually with paper copies is not encouraged. We highly recommend you use the online tool to benefit from all the reporting features and have the most positive experience possible.

5. Why is Orientation important? or, What’s the best way to prepare my group for the assessment?

Introduction to the Standards of Excellence: Once you fill out the Notice of Participation, you will gain access to step-by-step instructions of what to do for the entire assessment process. It is important that you prepare your group by providing orientation to the Standards of Excellence to ensure that group gets the most value out of the process and assure the most positive experience. Your group will need to understand what the Standards are and how they fit into the United Way work before they can effectively rate your United Way against them. Even if you have already conducted an introduction in the past, take time to orient new staff and board members. Click on the link below to view a PowerPoint presentation that provides orientation to the Standards and to the Self-Assessment. Notes Pages are included for your convenience. <https://online.unitedway.org/site/uwaservices/teampage.cfm?AID=5173>

It is also recommended that participants receive an advance orientation to the Self-Assessment tool itself. This assures that they will be comfortable with the tool and understand the purpose and benefits of the process. A good up front orientation will actually increase your participation and avoid many phone calls the week of the Self-Assessment. These orientations ideally take place within the month prior to your community’s Self-Assessment work.

To view the pre-recorded Self-Assessment orientation webinar and PowerPoint presentation click on the following link: <https://online.unitedway.org/site/uwaservices/teampage.cfm?AID=4345&showhidden4345=1>

It is also strongly recommended that you order copies of both the Standards and Self-Assessment booklets for each of your participants, especially your board members and staff. Distribute them during your orientation session. See questions #3 for details on ordering copies. With good orientation and materials in hand, your group will be ready to assess your organization.

6. Who should I invite to participate?

When a local United Way conducts the Self-Assessment, it is important to obtain individual responses from a sufficiently representative group of staff, volunteers, and community partners. This diverse set of inputs serves to improve the quality, validity, and usefulness of the diagnostic results. There is a minimum participation requirement, based on your United Way’s Metro size. The chart below shows the required *minimum* number of completed assessments required.

Metro Size	Minimum number of completed assessments
1	20
2-4	10
5-11	7

Volunteers and Community Partners

Invite those that have a good understanding of how your United Way functions. Do not use this assessment as a public opinion poll. We also do not recommend that you send this assessment to all your partner agencies. It can be quite frustrating for all your agencies to go through this long assessment when

they have little knowledge about how the UW functions. Instead, select a few partners who have worked closely with your United Way and will be able to provide feedback on your organization. Volunteers and Community Partners can include someone from a partnering coalition or foundation. Also consider involving long-time volunteers (or former staff) that have previously worked at your United Way.

Staff

We do recommend that you invite staff from a variety of levels and functions/programs. Your report will compare staff ratings versus non-staff ratings.

****Remember you are not required to specifically include community partners. It is important, that there is a balance of non-staff and staff participants in the assessment. When deciding who and how many people to invite, please be sure you have balanced numbers.**

7. *Is there a limit on participants?*

No, we have seen a range of 10 – 94 participants engage in the SOE Self-Assessment. It is a good idea for you to invite more than the minimum, to ensure you reach the participation requirement. However, the more participants you have, the more accurate and useful will be the results. Taking the assessment motivates people to later be active and interested in analyzing the results. Some United Ways have used this tool to help teach their board members about the new work of the UW. The tool itself has been a great learning experience to get the board speaking the same language and understanding the system concepts. As a general guide, invite those that have a good understanding of how your United Way functions. Although not everyone will have sufficient knowledge to be able to thoroughly assess all areas, 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.

8. *Any special advice for working with large groups of participants (over 30)?*

Recruitment: We recommend that you first send out a letter to your large group of desired participants, requesting their participation in the assessment. (Click [Sample Letter](#), to view UW of Greater Cincinnati’s recruitment letter). Upon receiving confirmation, arrange for an orientation session as well as send out the SOE and assessment booklets to them. This will allow you to save money and time by only sending necessary communication to those who commit to participating.

Indicate the role they will designate in the assessment: The participants will be asked to designate their role (board, staff, volunteer, or community partner) on the first few pages of the Self-Assessment. Consider telling them how you would like them to self designate. Technically, a board member can also be considered a volunteer. You will save yourself time, and assure optimum results, by telling participants upfront how to self designate on the first pages of the Self-Assessment.

Follow up after completion: consider asking your participants to send you an email once they have completed the assessment. This will help you keep track of your progress. Additionally, in the middle of your assessment week, check this webpage: <http://online.unitedway.org/site/soe/selfeval.cfm> to view an update on your participation numbers, broken out by role (staff, board members, volunteers, community partners). This will tell you whether or not you need to make a final push to the finish line.

9. Do I need to make up my own instruction sheet to send to participants in advance?

No, your self-assessment instruction sheets include step-by-step instructions for the participants. The project coordinator will need to complete two blank lines; 1) your organization number and 2) your assessment week dates. Then it is ready for you to email the instructions sheet out to the participants. It is recommended that you email the instruction sheet (instead of snail mail) as it contains the link to the online tool.

10. Will I need to provide UWA with all the emails of my participants?

No. You will not provide the email addresses to UWA. The coordinator (usually the CEO or other staff person at the local United Way) will collect the email addresses of all the participants and forward instructions sheets to them. The instruction sheets will be provided on the same web page as the Notice of Participation. The instruction sheets are very important because they contain the participants' link to the assessment.

11. What should participants do when they receive the instruction sheet?

Participants should be encouraged to immediately read the instruction sheet and test the link provided. The instructions suggest that they set aside a time and test the link before the assigned week. This will allow time to troubleshoot if, for some reason, the link does not work. During the assigned week, participants are asked to set an hour aside to complete the assessment.

12. Will participants need a special code to get onto the web-based assessment?

No. Participants will only need your United Way's Organization Number (5 digits). The assessment is on a separate website (not United Way Online) so they will not need a United Way Online account or special code.

13. Do I need to complete the Self-Assessment all in one sitting?

You do not need to complete the Assessment all in one sitting. Participants will have the ability to log onto the online assessment tool, 24 hours a day, during the week predetermined by the UW CEO. Participants can complete the assessments from any computer that has internet connection.

The participant instruction sheet includes clear directions on how to save your assessment without submitting it. If you are not tech-savvy and are concerned about spending too much time online, we suggest that you first complete the assessment on the paper, hard copy (*see question #3 on how to get a hard copy of the assessment questions*). This allows you to take all the time you need to think through the questions. Once you have finished the assessment on paper, log into the online tool and enter your responses in one sitting. This later process has been popular among our non-tech savvy groups.

Finally, if you have some participants with real concerns about using the online tool, a designated staff person may enter the results for the participant, by opening a new web browser page and entering in the data in one sitting. This will not affect the designated staff person from entering their own assessment scores. Just enter one set of assessment scores at a time.

14. Is there any way for me to receive an update on participation throughout the week?

Check this webpage: <http://online.unitedway.org/site/soe/selfeval.cfm> to view an update on your participation numbers. The update will show the total number of participants by role (board, staff, volunteer and community partner). The completed assessments are updated to the website on a nightly basis, thus you will not notice an automatic change in participation numbers. You may need to check the website the following day for a more accurate update.

15. How do I get final report for my United Way?

Your instruction materials provide all the information on how to retrieve your report, save it and read the report. To view your report, go to this website: <http://online.unitedway.org/site/soe/selfeval.cfm>.

Since the report is electronic you will have the ability to make virtual presentations on the results. Because the report is stored on United Way Online, only those with UWO user accounts may access the electronic report. The UW ought to download a copy of the report and distribute a Word version to those participants without UWO user accounts. Instructions are included on how to print a hard copy.

16. I need to report that I fulfilled membership requirement i. Where's the form?

After you have completed the Self-Assessment process be sure to report the completion to Membership Accountability. The web link to the form is found in your instruction packet. It can also be found at: [Requirement I "Self-Assessment" Confirmation Form](#) or http://online.unitedway.org/req_i_confirmation Do not send in a copy of your assessment. We can forward a copy to Membership Accountability should they need a copy.

17. How have other United Ways used their SOE Self-Assessment after receiving their reports?

Other than fulfilling the UWA Membership Requirement I, many United Way have and continue to use the results to inform their work as well as engage staff and volunteers in their work. Please visit the **SOE Self-Assessment Toolkit** (http://online.unitedway.org/soe_toolkit) to download success stories and practices on how you can integrate the assessment results into your United Way work. Make sure you rate each practice or story you read/use. We would love to know how valuable these stories are for your United Way.

18. Does UWA want to know what I did with the Self-Assessment results once I receive them?

While it is not required, we want to hear how the results sparked discussion among board members and staff. We would like to hear how the process helped you enhance your planning and journey towards transformation. The feedback and ideas will help us produce effective tools and most importantly allow us to help other UWs going through the same process. Email your post-assessment activities and lessons to linda.hernandez@uwa.unitedway.org We regularly update the samples into our SOE Self-Assessment Toolkit.

Ready to begin?

Log onto https://online.unitedway.org/soe_selfassessment for information, download materials/presentations and to begin your United Way's Self-Assessment process.