Thank you for taking time to complete the United Way Board of Directors’ Self-Assessment and Feedback survey. The results from this tool will allow the board and management to gain insight into what is working and what areas the board should improve to better carry out their role and United Way’s mission. Improvement suggestions and your honest assessment are welcomed. Your time and direct feedback is greatly valued – thank you!

***ALL RESPONSES WILL BE KEPT IN CONFIDENCE FOR REPORTING PURPOSES AND PRESENTED AS AN AGGREGATE SUMMARY.***

**Mission**

We believe everyone deserves the chance for a good life: a quality education that leads to a stable job, enough income to support a family, and good health.

**Values**

We hold ourselves accountable to our stakeholders and each other, by embracing our core values:

***Authentic***I will be truthful, genuine and respectful.

***Collaborative***I realize the good of the community is our highest calling. I will work together with all.

***Trustworthy***Establishing trust by keeping our word and following through on promises

***Inclusive*** I will create an inviting culture, where all individuals are valued and feel comfortable expressing ideas.

***Transparent***I will share ideas and information candidly, directly and freely.

**Board Member Name**: **Date:**

**A. Basic Responsibilities of the Board as a Whole (Select one choice per question)**

| **How satisfied are you that the Board, as a whole, is fulfilling its basic responsibilities?** | **Very**  **Satisfied** | **Somewhat**  **Satisfied** | **Neutral** | **Somewhat**  **Dissatisfied** | **Very**  **Dissatisfied** | **Not sure** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Keeps organizational efforts focused on United Way's vision, mission and core values and ensuring alignment of the organization’s governance to support the mission. |  |  |  |  |  |  |  |
| 2. Ensures effective direction-setting and organizational strategic planning. |  |  |  |  |  |  |  |
| 3. Formulates and manages general policies to oversee United Way |  |  |  |  |  |  |  |
| 4. Evaluates the Board’s own performance and developing a long-range plans. |  |  |  |  |  |  |  |
| 4. Manages United Way’s assets in a fiscally responsible manner. |  |  |  |  |  |  |  |
| 5. Ensures adequate resources and overseeing their allocation and management. |  |  |  |  |  |  |  |
| 6. Carries out United Way’s core values in all aspects of operations. |  |  |  |  |  |  |  |
| 7. Enhances United Way’s image, positioning, and visibility and acting as spokespeople for the organization |  |  |  |  |  |  |  |
| 8. Makes a personal financial contribution to the annual campaign. |  |  |  |  |  |  |  |
| 9. Supports and reviews the President/CEO’s performance. |  |  |  |  |  |  |  |
| 10. Actively supports the annual campaign. |  |  |  |  |  |  |  |

| **How satisfied are you that the Board, as a whole, is fulfilling its basic responsibilities?** | **Very**  **Satisfied** | **Somewhat**  **Satisfied** | **Neutral** | **Somewhat**  **Dissatisfied** | **Very**  **Dissatisfied** | **Not sure** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 11. Determines which programs and services are most consistent with United Way’s vision and mission and monitors their effectiveness. |  |  |  |  |  |  |  |
| 12. Develops and maintains cooperative relations with agencies, strategic partners and other funders. |  |  |  |  |  |  |  |
| 13. Actively leverage volunteer resources to impact local community needs. |  |  |  |  |  |  |  |
| 14. Has an appropriate public policy position and voice both locally and state-wide. |  |  |  |  |  |  |  |
| 15. Determines non-traditional funding streams to enhance the amount of funds under management. |  |  |  |  |  |  |  |
| 16. Is sufficiently representative of populations of color. |  |  |  |  |  |  |  |
| 17. Takes proactive steps to ensure that the Board and its committees represent the diversity of the community. |  |  |  |  |  |  |  |
| 18. Engages in the Inclusion and Development Council’s objectives to create an organization and community that is racism-free. |  |  |  |  |  |  |  |
| 19. Listens to the community by turning outward and champion education, income and health issues and causes. |  |  |  |  |  |  |  |
| 20. Leverages opportunities to effectively develop board members in a strategic and planned way. |  |  |  |  |  |  |  |
| 21. Supports the United Way network, fostering relationships and mutual accountability by participation in regional or national United Way efforts that have strategic payoff for our local United Way. |  |  |  |  |  |  |  |

**B. Indicate your level of satisfaction with the Board’s performance overall. (Select One)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Very**  **Satisfied** | **Somewhat**  **Satisfied** | **Neutral** | **Somewhat**  **Dissatisfied** | **Very**  **Dissatisfied**  **satisfied** | **Not**  **sure** | **Comments** |
|  |  |  |  |  |  |  |

**C. How likely is it that you would recommend United Way to a family member, friend or colleague?**

***(Scale is 1 to 5 with 1 unlikely and 5 very likely.) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**D. Expectations of United Way by Board Members (Select one choice per question)**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **How satisfied are you that UW staff meets the Board members’ expectations in providing:** | **Very**  **Satisfied** | **Somewhat**  **Satisfied** | **Neutral** | **Somewhat**  **Dissatisfied** | **Very**  **Dissatisfied** | **Not sure** | **Comments** |
| 1. An annual schedule of Board meetings. |  |  |  |  |  |  |  |
| 2. Advance notice of relevant committee meetings with materials sent at least three working days in advance? |  |  |  |  |  |  |  |
| 3. Creating an agenda that allows for discussions on relevant issues? |  |  |  |  |  |  |  |
| 4. A voice in setting the Board’s priorities? |  |  |  |  |  |  |  |
| 5. Quality support from professional staff that serve as partners to Board members? |  |  |  |  |  |  |  |
| 6. Adequate background information and related support for decision-making? |  |  |  |  |  |  |  |
| 7. Courteous, professional treatment and excellent customer service from all staff? |  |  |  |  |  |  |  |

**E. Indicate your level of satisfaction with the staff’s performance overall. (Select one)**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Very**  **Satisfied** | **Somewhat**  **Satisfied** | **Neutral** | **Somewhat**  **Dissatisfied** | **Very**  **Dissatisfied**  **satisfied** | **Not**  **sure** | **Comments** |
|  |  |  |  |  |  |  |

**F. The following addresses the four organizational benchmarks and your views on these goals. Since the measurements are still being defined only high level assessment can be done this year.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Meets Expectations** | **Does Not Meet Expectation** | **Unsure** | **Comments** |
| **SUPPORT: Donor, Volunteer & Advocate** |  |  |  |  |
| **Develop New Relationships:** Identify and engage new and non-traditional supporters to achieve bold community goals. |  |  |  |  |
| **Maximize Existing Relationship:** Current supporters to expand their United Way involvement (as a volunteer; advocate and/or investor) |  |  |  |  |
| **REVENUE** |  |  |  |  |
| **Financial Stability**: Meets compliance requirements (audit, UWW & IRS) and transparent reporting |  |  |  |  |
| **Financial Growth:** Campaign revenue will not exceed overall revenue sources by more than 85% of the whole. |  |  |  |  |
| **IMPACT/OUTCOMES** |  |  |  |  |
| **Align Allocations - Basic Needs**: to be held constant at 2014-2015 levels or diminish in future years, as greater % of funds are allocated to Strategy funding addressing Bold goals. |  |  |  |  |
| **Align Allocations - Strategies toward Bold Goals**: to increase as % of funds allocated overall. |  |  |  |  |
| **Monitor Targets:** Track community data related to bold goals |  |  |  |  |
| **TRUST** |  |  |  |  |
| **Organizational Excellence** |  |  |  |  |
| **Employer of Choice** |  |  |  |  |
| **Trusted Local Brand** |  |  |  |  |

**G. General Questions:**

1. How can we improve your board experience?
2. What should United Way: Stop? Start? Continue? (Please be specific.)
3. Share some strategic partnerships that would benefit United Way.
4. Who else should we engage with in the future and how?

***Thank you for taking time to complete this survey.***