Self Assesment Tool

The Annie E. Casey Foundation

What is the Self Assessment Tool?

Launched in 2000, The Self-Assessment Tool began as a product of collaboration between KIDS COUNT Network members and the staff at InnoNet. The tool was designed for KIDS COUNT Network members to assess the components of individual KIDS COUNT projects for planning purposes.

The Self-Assessment Tool is divided into five sections that represent the major program components originally identified by the KIDS COUNT Network. The sections include:

1. Data collection and analysis;
2. Communications and dissemination;
3. Fund development and sustainability;
4. Community and constituency mobilization; and
5. Policy analysis.

Originally, members filled out the tool and submitted it to InnoNet for analysis and reporting. Now however, Network members should complete the tool, and perform their own analysis.

How do we start using the tool?

Before examining the results of KIDS COUNT projects, you must understand how each project is carried out. This is done by identifying strengths and the areas that need improvement. The Self Assessment Tool helps break down the work that is done in your organization. Below are a few guidelines for using the tool:

- The tool should be completed at least annually, if not semi-annually.
- The tool should be completed by all KIDS COUNT staff together, to mutually assess how well each activity was completed, and prioritize the next steps for the project.
- Using the tool repeatedly and involving all staff in the process will lead to staff ownership and self-determination in the process.

Data collection and analysis activities	How well did we do this activity?				Who is responsible for this activity?			Was the activity completed on time?	
	Outstanding	Satisfactory	Needs work	Not applicable	KC project only	Organization only	Both	Yes	No
1) Identify data sources Definitions: *Outstanding* =Project identifies various data sources throughout the year, including state and county level agencies. Project researches the reliability and credibility of those data sources and makes modifications to data sources as necessary. *Satisfactory* = Project identifies data from various sources annually, including state and county level agencies. Project researches the reliability and credibility of those data sources before using those data and makes modifications to data sources as necessary. *Needs work* = Project does not proactively identify data sources and does not research the reliability and credibility of the data sources being used.									
Develop and maintain partnerships 2) to accomplish the data work Definitions: *Outstanding* =Project actively develops relationships with data partners (e.g., state department officials and child advocates) and works throughout the year with those partners to plan what data to collect, collect the data, identify indicators, develop new indicators, and plan the data product. The partners work together with the project on an ongoing basis, such as through a data committee of KIDS COUNT. *Satisfactory* = Project develops relationships with data partners and works with those partners annually to plan what data to collect, collect the data, identify indicators, develop new indicators and plan the data product. *Needs work* = Project solicits data from partners on an annual basis, but does not involve the partners in accomplishing the data work									

Each section of the Self Assessment Tool is constructed in the format of a two-part table that must be completed.

- The first table lists the section's necessary **Activities**, and how well they were executed.
- The second table brainstorms **Action Steps** for the future, and evaluates how past activities can be improved.

After you clearly identify how each of your activities was executed in the first table, next you will refer to this table to create an improved plan of action. The Action Steps table lists the next action steps for the goal of the section.

Data Collection and Analysis Action Steps				
If less than outstanding, not applicable, or not completed on time, why? What were the major challenges to completing this activity?	What are the proposed solutions to these challenges? (For example, technical assistance/ training; more resources including funding, time and staff; collaboration with others; or making item a priority)	What are the specific action steps you will take?	Who will be responsible for this action, and what is the timeframe for completing this activity?	Out of the activities listed in this chart, what priority is this activity for your project? Please rank.
#____				
#____				
#____				
#____				
#____				
#____				
#____				

Completing this Action Steps table will clearly outline the following questions:

- Why wasn't this activity done better?
- What got in the way?
- What will be done differently next time, and how will we do it?

Now you are ready to begin:

Below are specific instructions and suggestions that will help maximize the benefits from the tool:

1. Fill in the reporting period (e.g., 2005) that you are assessing.

2. Before beginning to fill out the table, take a moment to think about the component you are assessing, and the standard for that component to have a sense of where your project should be.

3. With each activity, read the rating indicators and discuss among staff what rating applies to that activity. The rating indicators define what outstanding, satisfactory, and not satisfactory mean for each activity, and should be used as benchmarks of quality for your project.

4. Check if the activity was done within the timeframe allotted or not. If not done on time, discuss why not, and what could be done differently to ensure that it is done on time in the future.

5. For each activity with a less than *outstanding*, *not done*, or *not done on time* rating, discuss and list the major challenges you faced when trying to complete this activity.

6. If outstanding and on time, congratulations! You might still benefit by taking the opportunity to discuss any challenges that did come up in the process, or what went so right to understand and replicate that process again.

7. For each major challenge, discuss and list possible solutions to those challenges.

8. Under the action steps column, prioritize the solutions and plan how you will implement these solutions the next time to improve the activities and the component.

9. Under the last column (who responsible and timeframe), decide who will carry out the action step, and what is the timeframe in which they will complete the action step.

What do we do with the Self Assessment Tool after we have used it?

Don't just file it away when complete! The tool is designed to be completed on a regular basis to continuously assess your work and plan your project's activities. Revisit the tool to gauge if and how you are improving in each component and to ensure that you are implementing your suggestions appropriately.