



THE ROUNDTABLE

STANDARDS & EXPECTATIONS FOR DIOCESAN SOCIAL ACTION OFFICES

ASSOCIATION FOR DIOCESAN SOCIAL ACTION DIRECTORS

EVALUATION TOOL

This evaluation tool has been prepared to be used internally as a self-assessment tool or in a peer consultation process in order to examine the effectiveness, comprehensiveness and range of a diocesan social action office's (DSAO) activities and review some of the competencies of its director. This tool is to be used alongside the Roundtable's Standards and Expectations reference document which proposes elements essential to an effective DSAO.

STRUCTURE OF A DIOCESAN SOCIAL ACTION OFFICE

A1. Does your office have a clear mission statement? Y N

A2. Has this mission statement been formulated in dialogue with the bishop and other diocesan officials? Y N

A3. Does your office have an annual work plan? (goals, objectives, timelines, allocation of resources, etc.) Y N

A4. Does your office have an annual evaluation process of its work? Y N

A5. Does your office have productive partnerships with other diocesan offices? *Mark Y or N and Why?*

Bishop's office Y N _____

Chancery Y N _____

Clergy Edu. Y N _____

Religious Edu. Y N _____

Schools Y N _____

Social Services Y N _____

Family Ministry Y N _____

Pro-Life Y N _____

Liturgy Y N _____

Youth Ministry Y N _____

Communications Y N _____

Campus/YA Y N _____

Lay Leadership Y N _____

Racial/Ethnic (list which offices)

_____ Y N _____

_____ Y N _____

A6. Does your office have a full time director? Y N

A7. Was the Director appointed by the bishop? Y N

A8. Is the office part of Catholic Charities, Catholic Social Services, etc. or does it stand alone? CC CSS Other: _____

A9. Does your office have enough professional and support staff to accomplish its mission/agenda/annual work plan? Y N

A10. Does your office receive an adequate budget from the diocese to support the staff and resources needed to accomplish the office's goals? Y N

A10a. If yes, provide a brief description. If no, what would the office add if it had more resources?

A11. Does your office raise/produce a portion of its own budget? Y N
What portion?

A12. Does your office have a commission or advisory board? Y N

A13. Are the parishes represented on this board? Y N

A14. Are the poor represented on this board? Y N

A15. Does this board have clearly defined communication and accountability lines to the bishop? Y N

A16. Does your office have a good working relationship with your local state conference, regional grouping, national offices?

State Y N Why? _____

Regional Y N Why? _____

National Y N Why? _____

FUNCTION/AGENDA OF A SOCIAL ACTION OFFICE

Ranking: 1 = low, 5 = high

B. PEACE & JUSTICE EDUCATION

B1. Does your office promote justice and peace education, through JustFaith Ministries or other programs? Y N

B1a. Please provide a brief description:

B2. Rate this function as a high or low priority of your office:

B3. Rate your office's effectiveness with this function:

B3a. What do you attribute this rating to?

B4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____ %

B5. How often does this function happen? (daily, weekly, monthly)

B6. What are your office's basic obstacles/problems related to achieving this responsibility?

B7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

B8. List the major programs or activities undertaken to achieve this responsibility:

C. ADVISING THE (ARCH)BISHOP

C1. Does your office advise and staff the (Arch)bishop on public policy and other matters? Y N

C1a. Please provide a brief description:

C2. Rate this function as a high or low priority of your office:

C3. Likewise, rate your office's effectiveness with this function:

C3a. What do you attribute this rating to?

C4. What percentage of your office's annual budget including staff time payroll) is allocated to this function? _____ %

C5. How often does this function happen? (daily, weekly, monthly)

C6. What are your office's basic obstacles/problems related to achieving this responsibility?

C7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

E8. List the major programs or activities undertaken to achieve this responsibility:

F. LEGISLATIVE ADVOCACY

F1. Does your office coordinate and stimulate legislative advocacy and networks? Y N

F1a. Please provide a brief description:

F2. Rate this function as a high or low priority of your office:

F3. Rate your office's effectiveness with this function:

F3a. What do you attribute this rating to?

F4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

F5. How often does this function happen?

F6. What are your office's basic obstacles/problems related to achieving this responsibility?

F7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

F8. List the major programs or activities undertaken to achieve this responsibility:

G. COMMUNITY ORGANIZING & INTERFAITH COALITIONS

G1. Does your office promote community organizing and interfaith coalitions? Y N

G1a. Please provide a brief description:

G2. Rate this function as a high or low priority of your office:

G3. Rate your office's effectiveness with this function:

G3a. What do you attribute this rating to?

G4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

G5. How often does this function happen?

G6. What are your office's basic obstacles/problems related to achieving this responsibility?

G7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

G8. List the major programs or activities undertaken to achieve this responsibility:

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H. CONCIIOUSNESS-RAISING & ADVOCACY

H1. Does your office create and implement consciousness-raising and advocacy projects on local, national, and international justice concerns?
Y N

H1a. Please provide a brief description:

H2. Rate this function as a high or low priority of your office:

H3. Rate your office's effectiveness with this function:

H3a. What do you attribute this rating to?

H4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

H5. How often does this function happen?

H6. What are your office's basic obstacles/problems related to achieving this responsibility?

H7. Does your office work on or support this function in cooperation with other diocesan entities?
Primarily with whom?
Y N

H8. List the major programs or activities undertaken to achieve this responsibility:

I. CATHOLIC CAMPAIGN FOR HUMAN DEVELOPMENT

I1. Does your office coordinate the Catholic Campaign for Human Development?
Y N

I1a. Please provide a brief description:

I2. Rate this function as a high or low priority of your office:

I3. Likewise, rate your office's effectiveness with this function:

I3a. What do you attribute this rating to?

I4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

I5. How often does this function happen?

I6. What are your office's basic obstacles/problems related to achieving this responsibility?

I7. Does your office work on or support this function in cooperation with other diocesan entities?
Primarily with whom?
Y N

I8. List the major programs or activities undertaken to achieve this responsibility:

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CATHOLIC RELIEF SERVICES/GLOBAL SOLIDARITY

J1. Does your office coordinate Catholic Relief Services and efforts on globalization and global solidarity? Y N

J1a. Please provide a brief description:

J2. Rate this function as a high or low priority of your office:

J3. Rate your office's effectiveness with this function:

J3a. What do you attribute this rating to?

J4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

J5. How often does this function happen?

J6. What are your office's basic obstacles/problems related to achieving this responsibility?

J7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

J8. List the major programs or activities undertaken to achieve this responsibility:

K. PRO-LIFE / RESPECT LIFE

K1. Does your office coordinate and/or cooperate with diocesan Pro-Life or Respect Life efforts? Y N

K1a. Please provide a brief description:

K2. Rate this function as a high or low priority of your office:

K3. Rate your office's effectiveness with this function:

K3a. What do you attribute this rating to?

K4. What percentage of your office's annual budget including staff time (payroll) is allocated to this function? _____%

K5. How often does this function happen?

K6. What are your office's basic obstacles/problems related to achieving this responsibility?

K7. Does your office work on or support this function in cooperation with other diocesan entities? Y N

Primarily with whom?

K8. List the major programs or activities undertaken to achieve this responsibility:

COMPETENCY AREAS FOR DIOCESAN SOCIAL ACTION DIRECTORS

Rate the Diocesan Social Action Director's abilities, skills or knowledge in each of the following areas: 1 = low, 5 = high and add comments.

Theological and Spiritual Formation

M1. Knowledge of Church's Social Teaching: _____

M2. Ability to articulate Social Teaching clearly: _____

M3. Skill to do social analysis in light of this teaching: _____

M4. A concern for the spiritual dimensions of social ministry: _____

M5. An awareness of the need for a rapport with the poor: _____

Social Action Skills

M6. Adult education skills: _____

M7. Community organizing skills: _____

M8. Understanding of linkage among direct service, education, advocacy, action and empowerment activities: _____

M9. Knowledge of the actors involved in local social change: _____

M10. Basic leadership skills: _____

Management Skills

M11. Planning and program development skills: _____

M12. Management and administrative skills: _____

M13. Time management and priority setting skills: _____

M14. Public speaking skills: _____

M15. Writing skills: _____

M16. Ability to work with & relate to peers, staff & volunteers: _____

M17. Supervisory skills: _____

M18. Understanding of diocesan level Church organization: _____

M19. Understanding of parish level Church organization: _____

M20. Unique skill or talent: _____