

Cultural Alliance of York County
Criteria for Allocations to Partners

Agency:

I. AGENCY OPERATIONAL PERFORMANCE	10 Possible	Comments
1. Are the audience/performances/classes/auditions growing?	_____	
2. Is sponsorship/membership growing?	_____	
3. Does the agency have active board participation?	_____	
4. Are volunteers active at this agency?	_____	
5. Are audiences well targeted?	_____	
6. Is diversity evident in the agency and its audiences and participants?	_____	
7. Are the agency's basic business practices sound?	_____	
Total	<input style="width: 80px; height: 20px;" type="text"/>	

10 - Agency has very strong organization, participants, and audiences. Year-over-year audience growth is very evident. Efforts to target its audiences are quite successful, and it has a strong diversity outreach. Management practices are excellent.

7-9 - Agency has a good organization, with solid participation and steady audiences. Targeting of audiences is evident, as is diversity outreach. Most business management practices are handled well.

4-6 - Agency is experiencing some organizational issues, but there is evidence they are being addressed. Participation and audiences have suffered somewhat, but steps are being taken to reverse this trend. While some fundamental management issues are well handled, a number of others are in need of solution.

0-3 - Agency shows signs of serious trouble, with little meaningful evidence of corrective action. Participation and audiences have declined significantly and steadily. Sound business management practices are little in evidence.

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II. STRATEGIC PLANNING	10 Possible	Comments
1. Does the agency have a current strategic plan? Are goals and objectives clear?	_____	
2. Has the agency made progress towards its plan? What if anything has changed?	_____	
3. Are the agency's products and services consistent with their strategic plan?	_____	
4. Are there specific and measurable outcomes or successes from their plan?	_____	
5. If agency does not have a strategic plan, has it done any self analysis?	_____	
5. Has the agency identify its obstacles and how to overcome them?	_____	
6. Does it have a unique connection to its market?	_____	
7. Is the agency trying to grow its audiences?	_____	
9. Is the board periodically updated on the plan and its progress?	_____	
8. Other factors	_____	
Total	<input style="width: 80px; height: 20px;" type="text"/>	

10 – Agency has an active plan and is working it into all its activities. The agency knows what its future direction is and can articulate it. The agency has a special mission in the community and is actively growing its audiences strategically.

7-9 – Agency has an active and current plan and is using it for most of its activities. Agency understands that it has some challenges to overcome and is working on a way to do that. It is trying to grow its audiences with some success.

4-6 – Agency has a plan that is recent and is in the process of assigning activities and a time line to the board. It knows there are obstacles but is unsure what they are, though trying to find them. It has a plan for growing its audience but has not yet had success. The board is aware of the plan but not yet actively engaged.

0-3 –Agency does not have a strategic plan or one within the past three (3) years and has not done any analysis with its board. Cannot articulate its competitive advantage and has done no audience development. The board is unaware of a plan.

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III. FINANCIAL ANALYSIS	10 Possible	Comments
1. Does the agency have a sustainable business model where revenue exceeds expenses?	_____	
2. Does the agency have appropriate financial controls?	_____	
3. Does the agency have a well diversified base of support and if not, does it have a strategy for diversifying it?	_____	
4. Has the agency met its financial projections (budget) last year and is the agency on target this year?	_____	
5. If the agency missed it's budget target in the previous year (or more), does the board have an approved plan for it's elimination?	_____	
6. Is the agency using a line of credit and paying back?	_____	
7. Is there an adequate cash reserve policy and is it being met?	_____	
8. Has the agency been able to sustain it's endowment and continue to grow it?	_____	
Total	<input style="width: 80px; height: 20px;" type="text"/>	

10 - Agency operates at a surplus and has a diversified support base. It has both a reserve fund and endowment that continue to grow or are meeting the agencies needs. The agency meets or beats projections each year with little or no deterioration of reserves. The agency has strong controls and no deficiencies noted from audit or review. And the agency is not using it's line of credit and has no outstanding debt.

7-9 - Agency operates at a break even budget and is never in deficit. It meets its budget regularly and may have used its line of credit but pays it off at least once a year. The reserve fund is maintained or continues to grow but not quite at the level required. The endowment is created and growing.

4-6 - Agency operates at a deficit more often than not but has shown at least one year in the last three where there was a surplus. The board is working on a plan to address the deficits incurred in the past few years but doesn't have a set plan. The support base is not very diversified but is part of the boards strategic plan to improve. The agency is borrowing on its line of credit and hasn't been able to pay it off at least once during the year.

0-3 - Agency continually operates at a deficit and has no plan on how to improve the financial situation. There are no reserves and the contribution support base is not diversified at all. There is no endowment and no plans for one in the near future until the financial position improves. The agency has extended its line of credit and has significant term loans that they are barely able to repay.

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IV. SUPPORT OF THE CREATIVE SECTOR	10 Possible	Comments
1. Does the agency work collaboratively with Cultural Alliance partners and other groups to promote the sector?	_____	
2. Does the agency use the Cultural Alliance logo at all possible occasions?	_____	
3. Does the agency publically credit the Alliance at curtain speeches, special events?	_____	
4. Does the agency abide by both the letter and spirit of the blackout policy?	_____	
5. Do the board and key stakeholders participate in the Cultural Alliance annual campaign?	_____	
6. Does the agency support the creative sector by cross marketing with the sector, swaps ads in program, web site collaborations, and linkages where possible?	_____	
7. Other factors	_____	
Total	<input style="width: 80px; height: 20px;" type="text"/>	

10 – Agency uses the logo everywhere and does not violate the blackout guidelines. Gives the Alliance credit for its grant. There is 100% board participation in the campaign and 80% participation at Board to Boards Meetings. Constantly and clearly promotes the creative sector in all publications and web site.

7-9 – Agency uses logo everywhere and does not violate the blackout guidelines. Gives the Alliance credit for its grant. There is 90% board participation in the campaign and 70% participation at Board to Boards meeting. Promotes the creative sector much of the time.

4-6 – Agency uses logo in most publications and sometimes may violate the blackout policy. There is 50-60% participation in the campaign and 50-30% or lower participation at the Board to Boards meeting. Sometimes promotes the creative sector but does not consistently promote them.

0-3 – Agency uses the logo sometimes. There is less than 50% board participation in the campaign and 30% or under attendance at the Board to Boards event. Little or no promotion of the cultural sector is provided.