

## SELF-ASSESSMENT REPORT CHECKLIST AND ORDER OF CONTENTS

(Send four printed copies and one electronic copy of the Self-Assessment Report; items marked with an asterisk [\*] need *not* be sent electronically.)

**Council Snapshot** (please use the template provided on the last page of this packet)

### **Analysis of the Council**

The Context in which the Council Works

- the state or jurisdiction
- the council's position
- the council's history of strategic planning and its plans for the future

The Council and the Humanities

- humanities achievements and plans for the future
- audiences
- communication and visibility
- programs
  - analysis of each program: one page per program

The Council's Organizational Effectiveness and Management

- organizational effectiveness
- organizational management
- staff and board
  - one-paragraph bio for each person

### **Supplemental Materials**

required

- actual expenditures for the past two fiscal years
- budget and actual expenditures for the current fiscal year
- latest audited financial statement, *only if there are any findings\**
- by-laws
- organizational chart
- conflict of interest statement/s (staff and board)
- personnel manual
- statement of organizational compliance with nondiscrimination laws and regulations
- list of grants made in the last two fiscal years
- map of the state or jurisdiction\*

other materials (four sets)\*

**Checklist:** include the completed checklist