

The 5 UNs of UN-Success - Evaluation Worksheet

This worksheet will help you step back and see the big picture of what you hope to accomplish and the potential risks for your organization or department. Once you have a chance to evaluate what they mean collectively, you can think more clearly about how to prioritize and plan to better affect the overall success of your organization.

Step 1. In the column below, list the name of each project you are currently working on, the ones you are planning to implement, and the future ones you hope to plan or implement within the next year. The following steps will give you greater insight. Feel free to group these in categories, or not. Feel free to include any personal changes. (Moving? Taking extra care of a family member? Getting married? Changing your diet or exercise plan?)

	Name of Project or Initiative	Rating #
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____
11.	_____	_____
12.	_____	_____
13.	_____	_____
14.	_____	_____
15.	_____	_____
16.	_____	_____
17.	_____	_____
18.	_____	_____
19.	_____	_____
20.	_____	_____
	Total	_____

Step 2. One at a time, evaluate the **Level** (Individual, Team, Organization) and **Kind** (Incremental, Transition, Transformation) of each project and write that project's number in the appropriate box below.

Step 3. Once you have assessed all of the projects listed, go back and write the corresponding box number (1, 2, or 3) on the line after the name of the project on the first page.

Step 4. Total all the numbers in that column. And notice how that makes you feel.

Levels:
↓

Organization	2	3	3
Team	2	2	3
Individual	1	2	3

Kinds: → **Incremental Transition Transformation**

Optional next steps:

- Feel free to categorize your list by project size, or risk, or personal, or business, or priority.
- Consider your immediate team's capacity, and how many are experiencing major personal changes.
- Evaluate your available resources: flexibility of budgets, staff time, quality metrics, competing priorities, and your organization's track record for project success.
- Remember each project is asking individuals, teams, or the company to change in some way.
- Decide what, if any, projects or priorities you want to change for greater success.

For more detail and support in this process, feel free to contact us.

Best of luck! – *Martha Legare*