



Managing for Excellence: Your Checklist for Giving

While there is only one annual winner of the Managing for Excellence Award, many nonprofits speak to the benefit of participating in the application process and learning about areas of strength as well as room for improvement in their organizations. When making an investment in a nonprofit, consider some of the sample characteristics of excellence in management below.

NOTE: Full management characteristics and application can be found online at www.cfgreateratlanta.org.

◇ GOVERNANCE

- Board members have written job descriptions.
- Board membership reflects the skills needed to oversee a successful organization.
- The organization has a conflict of interest policy that is signed by board members.

◇ FISCAL MANAGEMENT

- Organization's budget reflects its annual priorities.
- Board receives reports comparing budgeted vs. actual balances at least once each quarter.
- Organization has an annual independent financial audit that conforms to generally accepted accounting principles (GAAP) or has certified financial statements that conform to GAAP.

◇ PLANNING

- Organization establishes an annual plan and objectives consistent with the strategic plan.
- Planning takes into account and provides for procurement of resources necessary to achieve objectives.
- Consumer/client input is considered in the planning process.

◇ RESOURCE DEVELOPMENT

- Resource development plan is in place that reflects organization's mission and goals and that will generate the funds needed to be effective.
- Board recognizes the role it must play in resource development and is actively engaged.
- Organization provides letters to donors indicating the cost and tax deductible portions of certain contributions, like special events and some memberships.

◇ MARKETING & COMMUNICATIONS

- Organization has a public relations plan and process in place.
- Organization has a clearly stated policy on how it presents consumers to the public in speeches, publications, and other media, including strategies to protect consumer privacy and confidentiality.
- Organization has appropriate materials for use in public relations and marketing.

◇ VOLUNTEER MANAGEMENT

- Organization uses volunteers to expand and enhance services.
- Organization provides orientation, training and supervision for volunteers.
- Volunteers have written job descriptions.



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◇ HUMAN RESOURCES

- Board of Directors, senior management and entire staff are comprised of diverse individuals.
- Organization has written personnel policies that are distributed to all staff.
- All staff, including the executive director, receive annual written performance reviews that include a personal conference with the supervisor.
- The organization conducts an assessment of salaries and benefits at least every three years to determine appropriate levels.

◇ OPERATIONS

- Organization has a technology and information infrastructure that supports operations and planning.
- Adequate financial resources have been committed for technology.
- Organization has financial systems, policies and resources that enable it to assess, plan for and control facilities-related costs in the short and long term.

◇ COLLABORATION

- Organization has established collaborative relationships with other organizations in the community.
- These relationships involve significant activities, which may include working together to establish common goals, pooling resources, joint planning, implementing and evaluating services, and evaluating services and procedures.
- Collaborative relationships have been in place for at least one year.

◇ PROGRAM MANAGEMENT

- Core programs are in alignment with vision and mission.
- Organization measures results against outcomes.
- Consumer input is used in making program revisions.

◇ COMMUNITY OUTREACH

- Organization participates in community activities.
- Organization demonstrates the ability to communicate well with its neighbors.

◇ ADVANCING PUBLIC WILL

- The organization's leadership is articulate about the public policy issues that have impact on its ability to provide services, build on assets and receive contributions.
- Organization has an established public policy agenda.