

Checklist for Giving: Nonprofit Best Practices

While passion may drive the vision of a nonprofit, it is close attention to the mission and business operations that allows a nonprofit to make a significant impact on our communities. The Community Foundation for Greater Atlanta believes this focus on organizational management is essential when advising our donors on how to invest in a nonprofit organization. Consider these essential characteristics of highly effective nonprofits.

Community Outreach

- ◇ Organization participates in activities in the community in which it is located.
- ◇ Organization demonstrates the ability to engage and communicate well with community members.

Fiscal Management

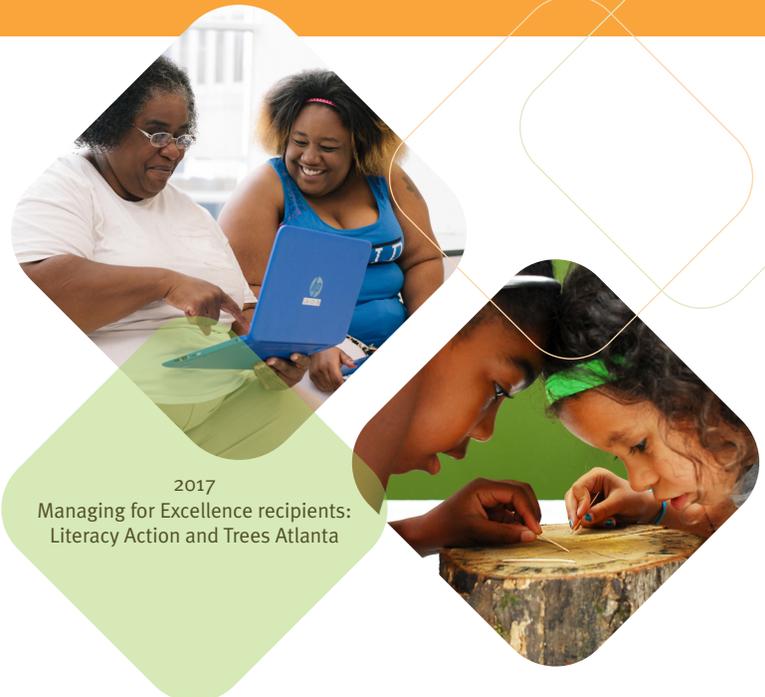
- ◇ Organization's budget reflects priorities designated in its strategic plan.
- ◇ Organization's board receives reports comparing budgeted vs. actual balances at least once each quarter.
- ◇ Organization has at least three months of cash reserves.
- ◇ Organization has an annual independent financial audit that conforms to generally accepted accounting principles (GAAP) or has certified financial statements that conform to GAAP.

Governance

- ◇ Board has terms and term limits that are enforced, formal committees and written job descriptions for members.
- ◇ Board membership reflects the skills needed to oversee a successful organization.
- ◇ Annually, 100% of board members make personal cash donations or financially measurable in-kind contributions and conduct a self-evaluation.
- ◇ Organization has a conflict-of-interest policy that is signed by board members annually.

Human Resources

- ◇ Board of Directors, senior management and entire staff are comprised of diverse individuals who are committed to an inclusive and equitable organization.
- ◇ 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 their supervisor.
- ◇ Succession plans exist for leadership of the staff (executive director and senior leaders).

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 presentations, publications and other media, including strategies to protect consumer privacy and confidentiality.
- ◇ Organization has appropriate materials for use in public relations and marketing, and an established social media presence.

(continued next page)

Checklist for Giving: Nonprofit Best Practices *(page 2 of 2)*

Operations

- ◇ Organization has a technology and information infrastructure that supports operations and planning, aligned with its strategic plan.
- ◇ Annually, organization dedicates adequate financial resources to repair, replace and regularly update 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.

Partnerships

- ◇ Organization has established collaborative relationships with other organizations in the community that have been in place for at least one year.
- ◇ These relationships involve significant activities, including establishing common goals, pooling resources, joint planning and evaluating services and procedures.
- ◇ Organization has a process to formally assess collaborative relationships.

Policy and Public Will

- ◇ Organization's leadership is articulate about the public policy issues and legislation that impact its stakeholders and its ability to provide services, build on assets and receive contributions.
- ◇ Organization participates in civic activities designed to educate elected officials, policymakers and the public about the issues and strategies tied to its mission.

Program Management

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

Resource Development

- ◇ Organization has a resource development plan in place that reflects organization's mission and goals, assigns staff and board responsibilities and contains strategies for generating funds from diverse sources.
- ◇ Board recognizes the role it must play in resource development and is actively engaged.
- ◇ Organization provides acknowledgement letters to donors indicating the cost and tax deductible portions of certain contributions, like special events and some memberships.

Strategic Planning

- ◇ Consumer/client input is considered in the planning process.
- ◇ Strategic plan includes metrics to track and measure results.
- ◇ Strategic planning takes into account and provides for procurement of resources necessary to achieve objectives.
- ◇ Organization establishes an annual plan and objectives consistent with its strategic plan.
- ◇ Staff and board measure organizational progress towards strategic planning goals through quarterly, semi-annual or annual written assessments.

Volunteer Management

- ◇ Organization uses volunteers to expand and enhance services.
- ◇ Organization screens individuals, conducting background checks as appropriate, and provides orientation, training, recognition and supervision for volunteers.
- ◇ Volunteers have written job descriptions.

2016
Managing for Excellence recipient:
Girl Scouts of Greater Atlanta

