Checklist for Giving: Nonprofit Best Practices

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

Advancing Public Will
- The organization’s leadership is articulate about the public policy issues and legislation that have impact on its ability to provide services, build on assets and receive contributions.
- Organization has an established public policy agenda.
- Organization participates in civic activities designed to educate elected officials or policy makers about the issues and strategies associated with its mission.

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 procedures.
- Collaborative relationships have been in place for at least one year.

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

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.

Governance
- Board has committees, conducts an annual self-evaluation and has written job descriptions for members.
- 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 annually.

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.
- Organization conducts an assessment of salaries and benefits at least every three years to determine appropriate levels.

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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, and an established social media presence.

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.

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

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

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 from a variety of 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.

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

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