

# 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.



2016 Managing for Excellence award winner, Girl Scouts of Greater Atlanta

## 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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