



Board Governance and Nonprofit Best Practice Checklist

This tool was designed to help nonprofit organizations assess their organizational capacity against a number of best practices recommended by the Center for Nonprofit Resources (C4NPR.org – Toledo, OH).

Each organization will need to decide for itself what changes, if any, to make in its governance and management policies and practices based on the self-assessment.

Developed in consultation with
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Board Governance

Mission and Vision

	Yes	No	N/A	Where to go for more information
1. Is the current mission statement appropriate and relevant?				Link to several articles on how to write the Mission, Vision and Values Statements and why they matter: http://managementhelp.org/strategicplanning/index.htm
2. Does the organization have a clearly-articulated 5- or 10-year vision?				Link to several articles on how to write the Mission, Vision and Values Statements and why they matter: http://managementhelp.org/strategicplanning/index.htm
3. Has the organization developed clearly- articulated values of guiding principles?				Link to several articles on how to write the Mission, Vision and Values Statements and why they matter: http://managementhelp.org/strategicplanning/index.htm
4. Does the board play a role in developing and regularly reviewing the organization's mission and vision?				Link to several articles on how to write the Mission, Vision and Values Statements and why they matter: http://managementhelp.org/strategicplanning/index.htm
5. Are the mission, vision and values used to drive decisions?				

Board Governance

Bylaws and Other Governance Policies

	Yes	No	N/A	Where to go for more information
6. Does the board have written bylaws in place which are accessible to all and to which the group adheres?				<p>BoardSource Article – “Bylaws” - http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/BoardSource%20Article%20-%20Bylaws.pdf</p> <p>C4NPR Sample – Bylaws by Creative Option C - http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/C4NPR%20Sample%20-%20Bylaws.Creative%20Option%20C.doc</p>
7. Does the board review the bylaws periodically and ensure adherence?				
8. Has the board adopted a Conflict of Interest Policy providing for the disclosure of potential conflicts and requiring board members to abstain from voting?				<p>Conflict of Interest from Policy Center for Nonprofit Management http://www.c4npr.org/C4NPR_ConflictofInterest</p>
9. Has the board adopted a Code of Ethics that establishes the standards of conduct for board and staff?				<p>NCNA Sample Board Code of Ethics from Michigan Nonprofit Association http://www.c4npr.org/codeofethics</p>
10. Has the board adopted policies for effective governance such as how meeting agendas are established and processes for decision-making?				<p>BoardSource article - “Governance Documentation” – http://www.c4npr.org/GovernanceDocumentation</p>

Board Governance

Bylaws and Other Governance Policies

	Yes	No	N/A	Where to go for more information
11. Are the board's policies easily referenced by all?				
12. Do the bylaws or governance policies provide for limited terms for board members and officers?				Blue Avocado Article with checklist: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/BlueAvocado%20Article%20-%20Bylaws%20Checklist.pdf
13. Do the bylaws or governance policies provide a process for making nominations and board appointments?				
14. Do the bylaws or governance policies provide a process for removing a board member when necessary?				
15. Do the bylaws or governance policies provide a clear process for handling urgent matters between meetings?				

Board Governance

Board Roles and Responsibilities

	Yes	No	N/A	Where to go for more information
16. Are the responsibilities of board members clearly spelled out in a board member position description?				Sample Board Member Position Description: from MEND – https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/c4npr%20Sample%20-%20Board%20Member%20and%20Committee%20Job%20Descriptions.MEND.pdf
17. Do all board members demonstrate understanding of and embrace their role as trustees of a nonprofit fiscally responsible to the public and to donors?				Ohio Attorney General’s Office Guide for Charity Board Members: http://www.ohioattorneygeneral.gov/GuideforCharityBoardMembers
18. Are all board members willing to participate in governance, that is, in making policy-related decisions that guide programs and operational activities?				Roles and Responsibilities of Nonprofit Board members in Ohio by Creative Option C - http://www.c4npr.org/BoardRolesPPT
19. As a matter of policy, do all board members demonstrate support for the organization’s mission?				BoardSource YouTube Video https://www.youtube.com/watch?v=l1UUGqClj6Q&index=2&list=PL9E098AD03A2E7A85
20. Do all board members annually self-evaluate their own performance as board members?				Board member Self-Assessment from Aurora Consulting: http://www.c4npr.org/clientuploads/Adaptive%20Leadership/C4NPR%20Workshop%20Handout%20-%20Board%20Member%20Self%20Assessment.Aurora%20Consulting.pdf

Board Governance

Board and Committee Structure

	Yes	No	N/A	Where to go for more information
21. Are the structure and responsibilities of each committee clearly outlined in written policies?				From MENDPoverty.org - Sample Board Member and Committee Job Descriptions: http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/c4npr%20Sample%20-%20Board%20Member%20and%20Committee%20Job%20Descriptions.MEND.pdf
22. Are the board's committees active and responsible for the work in their area?				
24. Do committee assignments reflect interests and skills of board members?				http://www.nonprofitworks.com/downloads/default.asp
25. Does the committee structure contribute to effective board governance and decision-making?				See also to Sample Board Member and Committee Job Descriptions above
26. Are board and staff roles with respect to committee work clearly understood and respected by all?				

Board Governance

Board Culture and Group Dynamics

	Yes	No	N/A	Where to go for more information
27. Is diversity of thought specifically encouraged among board members?				From NPQ.org, The Cyclical Nature of Board Behavior: http://www.nonprofitquarterly.org/governancevoice/12026-here-we-go-again-the-cyclical-nature-of-board-behavior.html Or visit Julia Classen's blog at: www.auroraconsult.org/blog
28. Is adequate time given for free and full discussion of important matters?				
29. When a difference of opinion emerges, is the matter resolved in a way that demonstrates respect for all?				
30. Are the talents of board members used effectively? Do board members enjoy their work and find it meaningful?				
31. Do board members communicate with each other in a way that builds trust and teamwork?				
32. Does the board have an annual retreat? Is it well-attended?				

Board Governance

Board Composition and Development

	Yes	No	N/A	Where to go for more information
33. Is the board comprised of individuals with the requisite skills, characteristics, interests, and experiences to perform the board's functions?				Board Matrix Sample by Creative Option C: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/Sample%20board_committee%20structure%20from%20Nonprofit%20Works.doc
34. Does the board composition represent the diversity in the community in terms of gender, race, age, geographic distribution, and stakeholder interests?				Board Diversity Assessment from Institute for Conservation Leadership - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/Sample%20board_committee%20structure%20from%20Nonprofit%20Works.doc
35. Does the board have enough productive members to effectively govern and fulfill its responsibilities?				
36. Does the board participate in identifying its board development needs and recruiting potential board members who might meet those needs?				BoardSource YouTube Video https://www.youtube.com/watch?v=XbVwDKbLVmc&index=9&list=PL9E098AD03A2E7A85

Board Governance

Board Composition and Development

	Yes	No	N/A	Where to go for more information
37. Does each new board member receive a board-led orientation to the organization including its policies, board member expectations, practices, and history?				From Technical Assistance for Community Services, 2004 - Board Orientation Checklist: http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/c4npr%20Sample%20-%20Board%20Orientation%20Checklist.TACS.pdf
38. Do board members participate in a regular self-assessment of the board's governance function?				http://www.c4npr.org/BoardGovernanceChecklist

Board Governance

Board Meetings

	Yes	No	N/A	Where to go for more information
39. Are meeting agendas and supporting materials provided to all board members prior to each meeting?				Sample meeting agenda - http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/Sample%20meeting%20agenda.CreativeOptionC.doc
40. Are all board members prepared for each meeting?				BlueAvocado Article about board packets http://www.blueavocado.org/node/581
41. Are board meetings well attended?				Attendance at Board Meetings is part of the Duty of Care: http://www.ohioattorneygeneral.gov/getattachment/4ebbc2fe-b053-427e-8730-de6cbd0244ff/Nonprofit-Handbook.aspx
42. Is there a written attendance policy for board meetings with stated consequences for excessive absenteeism?				Bylaws by Creative Option C: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/C4NPR%20Sample%20-%20Bylaws.Creative%20Option%20C.doc
43. Are minutes prepared for each meeting which are approved by the board and held in a central location as the corporate record?				Sample minutes from Carter McNamara: http://managementhelp.org/boards/sample-minutes.htm
44. Are board meetings focused on policy, planning, evaluation, fiscal responsibility, and other important long-term matters rather than on day-to-day operations?				Article from CreationInCommon about asking the right questions in meetings: http://www.creationincommon.com/board-engagement-learn-how-to-change-the-question/ns

Board Governance

Board Meetings Continued

	Yes	No	N/A	Where to go for more information
45. Does the board chair effectively facilitate to keep each meeting on track and allowing for full discussion of important matters?				Conduct a board meeting evaluation: Sample Board Meeting Evaluation from Board Catalyst - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/C4NPR%20Workshop%20Handout%20-%20Sample%20Board%20Meeting%20Evaluation%20Form.Board%20Catalyst.pdf
46. Are board meetings productive, making good use of board member time?				
47. Does everyone leave board meetings with a clear understanding of what has been decided and what will happen next?				Blue Avocado Article – Conducting an Effective Board Meeting - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/BlueAvocado%20Article%20-%20Conducting%20an%20Effective%20Board%20Meeting.doc

48. How can the board improve in the area of board governance?

Financial and Legal Matters

Compliance with State and Federal Laws

	Yes	No	N/A	Where to go for more information
49. Does the board have a legally-registered statutory agent and a current certificate of continuing existence from the Ohio Secretary of State?				Ohio Secretary of State's office: http://www.sos.state.oh.us/sos/upload/publications/busserv/Nonprofit.pdf
50. Does the board review and certify the accuracy of the IRS 990 (tax return form) each year before it is filed?				IRS 990 Information at: http://www.irs.gov/Charities-&-Non-Profits
51. Is the organization properly registered through the Ohio Attorney General's office and up to date with filings?				Ohio Attorney General's office Nonprofit Handbook: http://www.ohioattorneygeneral.gov/Files/Publications/Publications-for-NonProfits/Nonprofit-Handbook
52. Does the board conduct a periodic review of its compliance with federal and state laws?				OANO.org's Compliance Checklist: http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/Checklist%20for%20Ohio%20Nonprofit%20Organizations%201-10-14.pdf

Financial and Legal Matters

Compliance with State and Federal Laws

	Yes	No	N/A	Where to go for more information
52. Does the board conduct a periodic review of its compliance with federal and state laws?				OANO.org's Compliance Checklist: http://www.c4npr.org/clientuploads/Board%20Governance%20Resources/Checklist%20for%20Ohio%20Nonprofit%20Organizations%201-10-14.pdf
53. Does the board carry and review its general liability and Directors and Officers' liability insurance policies?				Nonprofit Law Resource Library http://www.hurwitassociates.com/l_risk_outline2.php
54. Is the board in compliance with laws governing legislative advocacy and lobbying?				www.bolderadvocacy.org

Financial and Legal Matters

Budgeting and Financial Oversight

	Yes	No	N/A	Where to go for more information
56. Does the board establish an annual budget that reflects the organization's priorities, goals and values?				NonprofitWorks.org Sample Line Item Budget: www.nonprofitworks.com/downloads/sample_line_item_budget.xls
57. Is the budget thoroughly discussed by the board before it is adopted?				Budgeting Checklist from Nonprofit Assistance Fund: https://nonprofitsassistancefund.org/sites/naf.../budgeting_checklist.pdf
58. Does the board regularly review financial reports (Profit and Loss Statement/Balance Sheet) that are timely, understandable, and support fiscal decision-making?				Nonprofit Finance Fundamentals PowerPoint by Dione Alexander of Nonprofit Finance Fund: https://asoft4240.accrisoft.com/npr/clientuploads/Financial%20Resources/Finance%20Fundamentals.pdf
59. Is the treasurer or another board member actively involved in preparing financial reports for the board?				
60. Does the board discuss discrepancies between the approved budget and actual income or spending?				
61. If a board member is concerned about something in the financial reports, could he or she speak up?				

Financial and Legal Matters

Audits

	Yes	No	N/A	Where to go for more information
62. [Organizations with annual income above \$300,000] Does the board require and review an annual audit by an external accounting firm?				From The Council of Nonprofits - https://www.councilofnonprofits.org/nonprofit-audit-guide
63. Does the board follow any recommendations in the management letter accompanying the external audit?				
64. [Organizations with less annual income] Does the organization have a policy in place to provide for an internal audit performed by board members who do not ordinarily have access to financial records and accounts?				Internal Audit Instructions and Checklist: https://asoft4240.accrisoft.com/npr/clientuploads/Financial%20Resources/C4NPR%20Sample%20-%20Internal%20Audit%20Instructions%20and%20Checklist.doc

Financial and Legal Matters

Financial Policies and Procedures

	Yes	No	N/A	Where to go for more information
65. Does the organization have and follow written financial management policies addressing internal controls, monitoring, whistleblowing, and investments?				<p>Ohio Attorney General’s office – Avoiding Theft Publication: http://www.ohioattorneygeneral.gov/Files/Publications/Publications-for-NonProfits/Avoiding-Theft-in-Your-Nonprofit</p> <p>Compasspoint Guide and Template https://www.compasspoint.org/guide-and-template-fiscal-policies-and-procedures</p>
65. Does the organization have and follow written financial management policies addressing internal controls, monitoring, whistleblowing, and investments?				<p>Ohio Attorney General’s office – Avoiding Theft Publication: http://www.ohioattorneygeneral.gov/Files/Publications/Publications-for-NonProfits/Avoiding-Theft-in-Your-Nonprofit</p> <p>Compasspoint Guide and Template https://www.compasspoint.org/guide-and-template-fiscal-policies-and-procedures</p>

67. How can the board improve in the area of Finance and Legal Matters?

Management and Leadership

Board-CEO Relationship

	Yes	No	N/A	Where to go for more information
68. Does the board provide clear goals, expectations, and identified performance indicators for the CEO?				Chair CEO Relationship from Aurora Consulting: http://www.c4npr.org/clientuploads/Managing%20Up/C4NPR%20Workshop%20Handout%20-%20Chair-CEO%20Relationship.Aurora%20Consulting.pdf E.D. Guidelines for Managing Up/Managing Down from Aurora Consulting: http://www.c4npr.org/clientuploads/Managing%20Up/Guidelines%20for%20Managing%20Up%20and%20Down.pdf Ten Common Commitments: http://www.c4npr.org/clientuploads/Managing%20Up/Building%20an%20Effective%20Team.pdf
69. Does the board provide adequate resources and authority as needed to achieve goals and meet stated expectations?				
70. Is there a climate of mutual trust and respect between the board and CEO?				
71. Do board members understand that only the board as a whole or a board designee can direct the CEO?				

Management and Leadership

Board-CEO Relationship

	Yes	No	N/A	Where to go for more information
72. Does the board provide a regular performance evaluation of the CEO?				MPERS Exec Director Evaluation Process and Criteria: http://www.c4npr.org/clientuploads/Managing%20Up/MPERS%20Exec%20Dir%20Evaluation%20Process%20and%20Criteria%20June%202013.pdf
73. Are the distinct roles and responsibilities of board and CEO understood and respected by all?				Link to article on Board-CEO Relationship in Nonprofit Quarterly https://nonprofitquarterly.org/governancevoice/584-effective-board-chair-executive-director-relationships-not-about-roles.html
74. Does the board allow and provide the CEO professional growth and development opportunities?				C4NPR offers a wide variety of workshops http://www.c4npr.org/main/professional-development-workshops-2015-by-category/

Management and Leadership

Change Management

	Yes	No	N/A	Where to go for more information
75. Is leadership open to new ideas that may emerge from board members, staff, customers or other stakeholders?				CompassPoint.org's Tom Wolfred on Leading Organizational Change: https://asoft4240.accrisoft.com/npr/clientuploads/Managing%20Up/CompassPoint%20Presentation%20-%20Leading%20Organizational%20Change.pdf
76. When a major change is underway, does the organization put a written plan in place?				See #75 above
77. Does the organization take time to celebrate short-term victories associated with long-term change efforts?				
78. Does the organization take steps to embed changes in the organization's culture?				

Management and Leadership

Leadership Development and Training

	Yes	No	N/A	Where to go for more information
79. Is there a regular process in place for veteran board members to mentor newer board members?				Nonprofit Quarterly article on mentoring millennials: https://nonprofitquarterly.org/daily-digest/14156-next-generation-leaders-what-they-want-and-need-from-the-workplace.html
80. Do board members engage in regular opportunities to participate in training and ongoing education?				C4NPR offers a wide variety of training programs http://www.c4npr.org/main/professional-development-workshops-2015-by-category/
81. Does the board regularly review its leadership needs and develop new board members to fill those roles?				BoardSource Article: Board Chair Transition – http://www.c4npr.org/BoardChairTransition

Management and Leadership

Leadership Transitions and Succession Planning

	Yes	No	N/A	Where to go for more information
82. Is there a written succession plan in place for the CEO?				A Research Article from CompassPoint.org– Succession Planning for Nonprofits: http://www.aecf.org/KnowledgeCenter/PublicationsSeries/ExecutiveTransitionMonographs.aspx
83. Are there written succession plans in place for the board’s leadership positions?				

84. How can the organization improve in the area of Leadership and Management?

Planning and Evaluation

Strategic Planning

	Yes	No	N/A	Where to go for more information
85. Does the organization have written document(s) that clearly describe the organization's mission, strategic vision, long-term and short-term goals and action steps?				From fredbartenstein.com – Strategic Planning www.fredbartenstein.com
86. Did the board take an active role in crafting the strategic plan?				Free Management Library http://managementhelp.org/strategicplanning/index.htm
87. Does the plan outline specific objectives for the board, board officers, and committees as well as staff?				BoardSource Article: Roles in Strategic Planning - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/BoardSource%20Article%20-%20Roles%20in%20Strategic%20Planning.pdf
88. Does the board regularly review the progress on the stated goals, and make adjustments as needed?				
89. Is the board able to use the strategic plan as a tool for assessing the performance of the CEO?				
90. Is the CEO able to use the strategic plan as a tool for assessing the performance of staff?				

Planning and Evaluation

Program Planning and Logic Models

	Yes	No	N/A	Where to go for more information
91. Are those responsible for program planning utilizing logic models to assess existing resources and develop desired outcomes and performance measures?				<p>-Logic Model Template by Jacob Burgoon, Evaluation: http://www.c4npr.org/clientuploads/Jacob%20Burgoon/Logic%20Model%20Template%20with%20Example.doc</p> <p>-Logic Model Template from Laurel Molloy of Innovations Quantified.com: http://www.c4npr.org/clientuploads/Planning&Evaluation/C4NPR%20Workshop%20Handout.Logic%20Model%20Template.IQ.doc</p> <p>- Logic Model Tips from Innovations Quantified.com: http://www.c4npr.org/clientuploads/Planning&Evaluation/C4NPR%20Workshop%20Handout%20-%20Logic%20Model%20Tips.Innovation%20Quantified.pdf</p>
92. Is program planning based on assessment of needs for people served or the community?				<p>Iowa State University Extension http://www.extension.iastate.edu/communities/assess</p>

Planning and Evaluation

Program Evaluation and Outcome Measurement

	Yes	No	N/A	Where to go for more information
93. Are the organization's measures for successful programs, services, and operations clear to everyone?				Evaluation Questions by Jacob Burgoon: http://www.c4npr.org/clientuploads/Jacob%20Burgoon/Evaluation%20Questions%20Examples.pdf
94. Does the board review outcomes data and performance measures to ensure effectiveness and efficiency of programs and make changes accordingly?				Library of Performance Indicators from CompassPoint.org: http://www.c4npr.org/clientuploads/Planning&Evaluation/CompassPoint%20Sample%20Library%20of%20Performance%20Indicators.pdf
95. Does the board have information, in addition to staff reports, by which to evaluate program effectiveness?				

96. How can the organization improve in the area of Planning and Evaluation?

Human Resources

Position Descriptions

	Yes	No	N/A	Where to go for more information
97. Are there written job descriptions for the CEO and other staff that clearly spell out their responsibilities?				The HR Department offers this Sample ED Job Description: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/HR%20Department%20Sample%20ED%20Job%20Description.pdf
98. Do all staff members have access to an up-to-date job description outlining their key responsibilities?				
99. Is there a process in place for regularly reviewing and updating the CEO and staff position descriptions?				

Human Resources

Employment Manual

	Yes	No	N/A	Where to go for more information
100. Has the board approved comprehensive personnel policies including staff selection, training, promotion, compensation, and grievance procedures?				Essential Elements for an Employee Handbook from The HR Department: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/HR%20Department%20Checklist.Essential%20Elements%20for%20an%20Employee%20Handbook.pdf
101. Do all staff have access to up-to-date copies of the Employment Manual?				
102. Are comprehensive personnel files maintained in a secure, legally-compliant manner?				From The HR Department Personnel File Checklist: https://asoft4240.accrisoft.com/npr/clientuploads/Human%20Resources%20Management/HR%20Department%20Checklist.Personnel%20File%20Documents.doc
103. Has the board defined its philosophy of progressive discipline and other important HR matters?				From TapRootFoundation.org – HR Literacy for the Nonprofit Sector: http://www.taprootfoundation.org/docs/Human-Resources-Literacy.pdf

Human Resources

Compensation

	Yes	No	N/A	Where to go for more information
104. Does the board regularly review and update the salary and benefits packages of the CEO and employees?				Sample C4NPR 2011 Salary Survey by Findley Davies : https://asoft4240.accrisoft.com/npr/clientuploads/2011_Salary_Survey_Report.pdf
105. Does the board review contracts and performance of independent contractors employed by the organization?				From SHRM.org - http://www.shrm.org/templatestools/samples/hrforms/articles/pages/cms_020334.aspx

Human Resources

Performance Evaluation

	Yes	No	N/A	Where to go for more information
106. Does the board provide a written performance evaluation to the CEO at least annually?				From The HR Department -Sample Annual Non-Exempt Performance Evaluation http://www.c4npr.org/clientuploads/Human%20Resources%20Management/HR%20Department%20Sample.Annual%20Non-Exempt%20Performance%20Evaluation.doc 90-Day Evaluation Spreadsheet - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/HR%20Department%20Sample.90%20day%20evaluation.xlsx
107. Do all staff members receive written performance evaluations by the CEO annually?				
108. Are performance evaluations based on clearly identified expectations spelled out in strategic and program plans, the Employment manual, and position descriptions?				

109. How can the organization improve in the area of Human Resources?

Volunteers

Policies

	Yes	No	N/A	Where to go for more information
110. Does the organization have strategies and infrastructure for mission-driven volunteer engagement?				From Points of Light Foundation http://www.readinessroadmap.org/
111. Does the organization have comprehensive policies in place governing volunteers and their activities?				From Charity Village https://charityvillage.com/Content.aspx?topic=policies_and_procedures_for_volunteer_programs#.VUc7ZpPF44E
112. Does the organization have a risk management policy?				From the Non Profit Risk Management Center: http://nonprofitrisk.org/tools/volunteer/no-surprises.shtml
113. Does the organization carry sufficient liability insurance to cover volunteers?				See link at item #53
114. Does the organization's budget contain sufficient resources for developing and supporting volunteers?				From Volunteer Match - http://blogs.volunteermatch.org/engagingvolunteers/2013/12/19/5-important-considerations-when-creating-a-volunteer-program-budget/

Volunteers

Recruiting and Screening

	Yes	No	N/A	Where to go for more information
115. Does the organization have a strategy for outreach and volunteer recruitment to sustain ongoing volunteer engagement?				From Points of Light Foundation: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/HandsonNetwork%20PPT.pdf
116. Does the organization have a plan for screening, selecting, and matching volunteers?				From Idealist.org, an article on Volunteer Screening, http://www.idealists.org/info/VolunteerMgmt/Screening
117. Does the organization conduct background checks on volunteers who handle money or who are around vulnerable people (children, elderly, disabled, etc.)				Skills-based Readiness Checklist from Points of Light Foundation http://pointsoflight.mkt4753.com/POL_PDF_Landing_Pages/Common_Impact_Skills-Based_Volunteer_Project_Readiness_Checklist/?utm_source=SilverpopMailing&utm_medium=email&utm_campaign=POL_Dynamic_Newsletter_2%20%286%29&utm_content=&spMailingID=48402399&spUserID=MTI5MjY1NjI2NzMxS0&spJobID=661635736&spReportId=NjYxNjM1NzMxS0
118. Does the organization have a method to match volunteers to the most appropriate role?				

Volunteers

Training and Retention

	Yes	No	N/A	Where to go for more information
119. Has the organization developed a curriculum/manual for training volunteers on their respective roles?				For more information, contact http://www.DOVIA.org Volunteer Retention from Energize.inc, http://www.energizeinc.com/art/subj/Reten.html
120. Has the organization equipped volunteers to work with each other?				
121. Does the organization clarify roles, re-train and support volunteers throughout their service tenure?				
122. Does the organization's leadership demonstrate commitment to volunteer engagement by dedicating sufficient resources (time, money, people, tools)?				See #110 above
123. Does the organization invite dialogue with volunteers?				From Volunteer Power http://www.volunteerpower.com/resources/Icebreaker.asp

Volunteers

Tracking and Evaluation

	Yes	No	N/A	Where to go for more information
124. Does the organization have a method to track the outputs and outcomes of volunteer contributions?				Kellogg Evaluation Resource: http://www.wkkf.org/resource-directory/resource/2010/w-k-kellogg-foundation-evaluation-handbook
125. Does the organization monitor the quality of the volunteer experience?				Logic Model Tutorial: http://www.usablellc.net/Logic%20Model%20%28Online%29/Presentation_Files/index.html
126. Is the organization able to articulate volunteer contributions and impact?				OMB Performance Measurement and Evaluation: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/Performance%20Measurement%20and%20Evaluation%202001%20OMB.pdf

127. How can the organization improve in the area of Volunteers?

Fundraising

Board Involvement

	Yes	No	N/A	Where to go for more information
128. Are all board members actively involved in securing adequate financial resources to fund the budget?				Fundraising Strategies for Board Members from Gail Perry.com: http://www.gailperry.com/2013/11/6askfundraisingstrategies-board-members/
129. Does the board understand and support the organization's income strategies?				
130. Is there a written agreement concerning any expectation that board members contribute financially?				Board Member Contract Sample from Board Café https://www.compasspoint.org/board-cafe/board-member-contract

Fundraising

Fundraising Planning

	Yes	No	N/A	Where to go for more information
131. Does the organization have a written plan for fundraising that outlines roles and responsibilities of board, staff and volunteers?				From Grassroots Fundraising.org: http://www.peoplepoweredmovement.org/site/images/uploads/Fundraising_Planning_Worksheet.pdf
132. Does the organization have a written plan in place that outlines which fundraising methods the organization will use (and not use) in a given year, including events, mail, major donor, grant-writing, social media, etc?				-Annual Campaign information from GrassRootsFundraising.org: http://www.grassrootsfundraising.org/2011/09/launchingan-annual-campaign/
133. Does the organization have a written plan in place that provides for regular, renewable sources of unrestricted income to support operations?				
134. Does the organization's budget provide sufficient resources for fundraising (printing, mail, events, etc.)?				

Fundraising

Databases and Information Management

	Yes	No	N/A	Where to go for more information
135. Does the organization have a secure contact management system for donors/potential donors?				Donor Management Software recommendations and discounts at: http://www.Techsoup.org
136. Do all board members participate in providing updated information for donors/potential donors?				From Gail Perry - http://www.gailperry.com/board-training/get-your-board-members-fired-up-and-in-action-for-the-cause-articles/the-fired-up-board-preparing-your-board-members-for-fundraising/
137. Does the organization know where to find donor and grantmaker information?				Donor and Grantmaker Information, can be found via: - http://fconline.foundationcenter.org/ - http://www.nozasearch.com/

Fundraising

Campaigns and Gift Acceptance

	Yes	No	N/A	Where to go for more information
138. Are board members aware of grants received, any stipulations, restrictions or requirements in the award contract and how the funds are tracked in the financials?				My Top Ten Things Every Board Members Needs to Know About Grants by Michelle Klinger - https://www.linkedin.com/pulse/my-top-ten-things-every-board-member-needs-know-grants-klinger
139. Do board members know how gifts can be received (cash, checks, online, stocks, property, estate plans, etc.)?				OANO recommends boards adopt a gift acceptance policy. See their Standards of Excellence: https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/OANO%20checklist.pdf
140. Does the organization use technology (website and social media) to ask for and receive donations?				Eight Tips for Email Fundraising at Fundraising123.org: http://www.fundraising123.org/article/8-tips-emailfundraising#.Uxn3qM4VxvG
141. Does the organization regularly solicit donations from board members, staff, volunteers, and members?				Aimee Eisenstein presentation, Volunteers as Fundraisers - https://asoft4240.accrisoft.com/npr/clientuploads/Board%20Governance%20Resources/Volunteers%20as%20Fundraisers%202011.pdf

142. How can the organization improve in the area of Fundraising?

Technology

Computers and Equipment

	Yes	No	N/A	Where to go for more information
143. Does the organization have the ability to use functioning computers that are basically up to date?				
144. Does the organization have a regular and reliable process for backing up computer records?				Consider Carbonite - http://www.carbonite.com/in-action/cloud-backup/nonprofit And read: http://www.netcorps.org/press-room/blog/online-backup-for-small-and-medium-nonprofits
145. Does the organization have reliable access to the internet?				

Technology

Record Keeping

	Yes	No	N/A	Where to go for more information
146. Does the organization use computer software (Excel, QuickBooks) to keep financial records?				See C4NPR.org's Technology for Nonprofits Page: http://www.c4npr.org/main/technology/
147. Does the organization have software to record the types of services provided to individuals/families?				Visit Techsoup.org for discounts on Microsoft Excel, Volunteer Management and Donor Management software for nonprofits.
148. Does the organization have software to record individuals or families enrolled/served through programs as well as client outcomes?				
149. Does the organization have software capable of keeping track of donors, members and volunteers?				
150. Is the organization's electronic records, including email, address in a Document Retention and Destruction Policy?				Document and Retention Sample Policy from C4NPR - https://asoft4240.accrisoft.com/npr/clientuploads/The%20990/6%20Sample%20Document%20Retention%20&%20Destruction%20Policy.pdf

Technology

Internal Communications

	Yes	No	N/A	Where to go for more information
Does your organization make use of Web 2.0 tools to communicate?				See CNPR.org's <i>Technology for Nonprofits</i> Page: http://www.c4npr.org/main/technology/

152. How can the organization improve in the area of Technology?

Marketing and Public Relations

(includes Social Media)

Public Relations

	Yes	No	N/A	Where to go for more information
153. Do board members positively represent the organization in the community?				BoardSource YouTube video: Enhancing the Organization's Public Standing https://www.youtube.com/watch?v=JhZHx-e06O8&list=PL9E098AD03A2E7A85&index=11
154. Does the organization publish an annual report?				How to Write an Effective Annual Report – by Eric Jacobson: http://www.slideshare.net/EricJacobsonAscend/how-towrite-an-effective-nonprofit-annual-report -From the Network for Good, Writing Your Annual Report in Five Easy Steps, by Kivi Leroux Miller http://www.fundraising123.org/article/writing-your-annual-report-five-easy-steps#.VUk9r_IViko
155. Does the board regularly review the organization's marketing and PR position and strategy and make adjustments as needed?				From GettingAttention.org and Nancy Schwartz – http://gettingattention.org/articles/187/strategies-campaigns/build-leadership-support.html

Marketing and Public Relations

(includes Social Media)

Branding and Storytelling

	Yes	No	N/A	Where to go for more information
156. Has the organization discussed branding and ways to implement your brand across media platforms?				Brand Identity for Nonprofits by Sam Frank at 4Goodorg - https://4good.org/sam-frank/brand-identity-for-nonprofits
157. Is the organization adept at telling its story?				From Julie Brown, In the Beginning Nonprofit Founding Stories - https://community-foundation.com/in-the-beginning-nonprofit-founding-stories/
158. Does the organization make use of a unique logo and other visual elements on all printed and online materials?				Make sure your logo tells your story from Chronical of Philanthropy https://philanthropy.com/article/How-to-Make-Sure-Your-Logo/226765
159. Does the organization have clear text (consistent message) that is used on all printed and online materials?				4 Cornerstones of your Nonprofit Message Platform from Nancy Schwartz - http://gettingattention.org/articles/1875/message-development/nonprofit-message-platform.html
160. Does the organization have a simple tagline that tells all who see or hear it exactly what your group does?				Seven Dos and Don'ts for Strong Nonprofit Taglines (Case Study) from Nancy Schwartz - http://gettingattention.org/articles/136/message-development/guidelines-nonprofit-taglines.html
161. Does the organization have a picture or simple informational graphics that tell the story of what you do?				Use https://www.canva.com/ to help you create professional graphics at no cost.

Marketing and Public Relations

(includes Social Media)

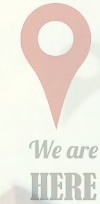
Social Media

	Yes	No	N/A	Where to go for more information
162. Is your “Donate” button accessible on your website and mobile-friendly?				https://www.google.com/webmasters/tools/mobile-friendly/
163. Are you using multiple forms of social media?				https://nonprofitquarterly.org/management/23837-how-nonprofits-use-social-media-to-engage-with-their-communities.html
164. Is the organization using social media consistently according to a set editorial calendar for posting?				From Beth Kanter.org - Social Media Strategy, The Networked Nonprofit: http://www.slideshare.net/kanter/networked-nonprofitslides-3671181
165. Does the organization have a policy on use of social media that outlines who may post on behalf of the organization?				From Beth Kanter.org – Does Your Organization Have Social Media Guidelines for All Board & Staff?: http://www.bethkanter.org/staff-guidelines/

166. How can the organization improve in the area of Branding and Media?



*You make a difference.
We're here to help.*



For additional resources and information,
visit our Resource Library: Running a
Nonprofit section at c4npr.org