

Principles & Practices for Nonprofit Excellence

Nonprofit Excellence Assessment

Instructions: Rate how you perceive your organization using the following scale:

- ✓ **Yes** - We meet this standard consistently.
- ⚠ **In Progress** - We are working toward meeting this standard.
- ✗ **No** - We do not currently meet this standard.

Please note: there are no scores associated with each area. While we believe each area is essential for nonprofit excellence, how your organization may put it into practice can vary greatly. Some items may be a lower or higher priority for your organization than it may be for another organization.

Advocacy

Team	
	Our organization understands the difference between advocacy, lobbying, and political activity.
	We have a clear advocacy strategy aligned with our mission and goals.
	We engage with policymakers and stakeholders to promote positive policy change.
	Our staff and board receive training on advocacy rules and best practices.
	We educate our community and supporters on relevant policy issues.

Communications

Team	
	Our organization has a clear and consistent brand identity.
	We use multiple communication channels (social media, newsletters, press, etc.) to engage stakeholders.
	We ensure our messaging is inclusive and accessible to diverse audiences.
	We have a crisis communication plan in place.
	Our staff and board are trained on effective communication strategies.

Diversity, Equity, & Inclusion

Team	
	Our organization has a written DEI policy that guides decision-making.
	We actively recruit and retain diverse board members, staff, and volunteers.
	Our programs and services are designed to be inclusive and accessible.
	We provide regular DEI training for leadership and staff.
	We seek community feedback to ensure our services meet diverse needs.

Evaluation & Impact Measurement

Team	
	We have clear goals and measurable outcomes for our programs.
	We regularly collect and analyze data to assess impact.
	We use evaluation results to improve our programs and services.
	We communicate our impact effectively to stakeholders and funders.
	We involve beneficiaries and community members in our evaluation process.

Financial Management

Team	
	We follow Generally Accepted Accounting Principles (GAAP) for nonprofit financial management.
	Our board regularly reviews financial statements and budgets.
	We have internal controls to prevent fraud and financial mismanagement.
	We conduct independent financial audits or reviews as required.
	Our organization has a financial sustainability plan.

Fund Development

Team	
	We have a diversified funding strategy (grants, donations, sponsorships, etc.).
	Our fundraising practices follow ethical and legal guidelines.
	We provide transparency in how donations are used.
	We build and maintain strong relationships with donors and funders.
	Our board plays an active role in fundraising efforts.

Governance

Team	
	Our board has a clear understanding of its roles and responsibilities.
	We have bylaws and policies that guide board operations.
	Board members participate in regular training and self-assessments.
	We have a conflict-of-interest policy for board and staff.
	Our board regularly evaluates the executive leadership.

Human Resources & Organizational Culture

Team	
	We follow fair and legal hiring practices.
	Staff and volunteers receive proper training and support.
	We have policies for performance management and professional development.
	Our organization promotes a positive workplace culture and work-life balance.
	We have policies to prevent harassment and discrimination.

Information Technology

Team	
	We have secure systems for storing sensitive donor and client information.
	Our staff and volunteers receive training on cybersecurity best practices.
	We have a plan in place for data breaches or technology failures.
	We regularly update and back up our digital records.
	We ensure accessibility of technology for diverse users.

Strategic Planning

Team	
	We have a current strategic plan that guides our long-term goals.
	Our board and staff actively participate in strategic planning.
	We regularly review and update our strategic plan based on community needs.
	We align our budget and resources with strategic priorities.
	We engage community members and stakeholders in the planning process.

Which areas do you perceive to be the strongest?

Which areas need the most immediate attention?

What resources or supports will help your organization achieve excellence?