WNC NONPROFIT
pathways

**NONPROFIT
EFFECTIVENESS
SURVEY**

Effective nonprofit organizations are focused on mission, customers and outcomes, and they are sustainable and adaptable. This survey is designed to help organizations think beyond **_what_** they are doing to **_how_** they are performing their service to the community. While no one approach is comprehensive, this assessment tool can be used to get a reasonable impression of the quality of the most important practices in your nonprofit.

How to use this tool
- The assessment tool is divided into the fundamental categories of nonprofit management: planning, governance, financial management, legal accountability, fund development, communications and evaluation; an additional section on administration/other is included.
- For each topic there are specific performance indicators with choices, including "Met," "Needs Work," "Not Applicable/Don't Know." After reading each indicator, place a check mark under the appropriate choice as to how your nonprofit performs to that indicator. Space is provided for notes.
- Your nonprofit will benefit most if multiple leaders in your nonprofit complete the same tool, all results are compiled into one overall report, and then all of you share your conclusions about results of using the tool.

PLANNING

Indicator	Met	Needs Work	N/A	Notes
Our organization has a clear organizational mission and people on all levels of our organization understand it				
Our mission and activities address a critical community need				
Our organization periodically reviews the mission statement to assess whether the conditions it addresses still remain and if our organization is still the best organization to address them				
Our organization ties its mission, strategic planning and performance measurement together				
The Board and functional areas of our organization are involved in the strategic planning process				
Our organization has taken the lead in identifying unmet community needs and developing innovative solutions to address those needs				
Clients have the opportunity to participate in program development				

GOVERNANCE

Indicator	Met	Needs Work	N/A	Notes
Our organization has clear lines of authority and responsibility				
Our organization has a supportive, engaged and knowledgeable Board that relates well with the Staff leader and the broader community				
Board meetings have written agendas and materials relating to significant decisions are sent out in advance of the meeting				
Our Board has a process for handling urgent business between meetings				

FINANCIAL MANAGEMENT

Indicator	Met	Needs Work	N/A	Notes
Our organization has a high degree of trust and credibility in the community				
Our organization has a written fiscal policy and procedures manual and follows it				

LEGAL ACCOUNTABILITY

Indicator	Met	Needs Work	N/A	Notes
Our organization has processes in place to periodically assess compliance with federal, state and local laws				

FUND DEVELOPMENT

Indicator	Met	Needs Work	N/A	Notes
Our organization has a diverse funding base that attracts sufficient financial resources				
Our Board, executive director, and committee supports and participates in the total fundraising process including project identification, cultivation, solicitation and recognition				

COMMUNICATIONS

Indicator	Met	Needs Work	N/A	Notes
Our organization informs stakeholders about our plans, programs and services				
Our organization has educated the Board and Staff to communicate effectively				
Customer satisfaction is a primary concern and everyone connected with the organization treats customers with respect and courtesy				

EVALUATION

Indicator	Met	Needs Work	N/A	Notes
Our organization's programs and activities have well-defined outcomes that we evaluate annually to determine if we have a real impact on society				
Our organization has a process in place that monitors the needs of our constituency				
Our organization involves stakeholders in the evaluation process and informs all appropriate stakeholders about our evaluation results				

ADMINISTRATION/OTHER

Indicator	Met	Needs Work	N/A	Notes
Staff has sufficient training and skill level to produce the program				
Our Staff leader creates a culture that enables and motivates the organization to fulfill its mission				
Our organization values its employees and invests in Staff development				
Our organization is invited by others to help plan for the future and solve community challenges				
Our organization advocates for the causes and people we represent				
Our organization has a volunteer management plan including recruitment policy, job descriptions, application/interview process and recognition				
Our organization is current in its use of technology				

Attribution
This document incorporates information from the Greater Twin Cities United Way and Centerpoint for Leaders. We acknowledge and appreciate these organizations' work to help the nonprofit sector be accountable and effective.

Next steps
Explore www.nonprofitpathways.org to see the wide range of learning opportunities and resources available to strengthen your nonprofit organization.