



## Common Recommendations to Improve Nonprofits and Their Order of Implementation

The ultimate list of recommendations that a nonprofit should implement should be the result of a careful organizational assessment, as well as use of a relevant organizational diagnostic model that suggests which of the recommendations are most important to implement and in which order.

- An example assessment is at <https://www.surveymonkey.com/r/svf38mm> .
- A suitable associated diagnostic model is at <http://tinyurl.com/y598vgsg> .
- That overall analysis might produce a list of some or all of the types of issues listed at <http://tinyurl.com/y5mmjrhy>.
- The ultimate list of recommendations would be those to address those issues.

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### Board operations

Form a Board Governance Committee to oversee the following actions: (Coach the Board Chair to work with the entire Board to do the actions.)

- Conduct at least a one-hour Board training session each year about roles and responsibilities of a governing Board of Directors and Chief Executive Officer.
- Conduct at least a one-hour Board orientation each year about the Board's unique practices.
- Ensure annual strategic planning to identify the nonprofit's mission, goals, strategies, objectives, specific responsibilities to achieve each, timelines, etc.
- Ensure Board staffing procedures are based on obtaining expertise needed to achieve the most up-to-date strategic goals.
- Ensure each Board member has something specific to do, such as membership on a Board Committee.
- Ensure each Committee has a work plan that specifies the objectives and timelines for the Committee to achieve during the year. Each Committee regularly reports the status of implementation of its work plan in each Board meeting.
- Establish a Board Executive Committee to be comprised of Committee Chairs and to "police" that work plans are being implemented on a timely basis by each Committee.
- Establish a Board Personnel Committee to supervise the Chief Executive Officer in effectively working with the revamped Board and staff.
- Ensure the Chief Executive Officer has annual performance goals and is evaluated against those goals.
- Conduct a Board self-evaluation each year and ensure that results are addressed.
- Enact a Board attendance policy to sustain strong attendance.

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### Strategic planning

Form a Board Planning Committee to oversee the following actions:

- Ensure involvement of, and/or input from, staff, clients and other stakeholders in the strategic planning process.
  - Ensure effective Board development, especially regarding their responsibility to ensure effective strategic planning and implementation. The Board Governance Committee should oversee the activities listed in the previous section of this table.
  - Develop a "plan for plan" that ensures that upcoming strategic planning is relevant,
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realistic and flexible to suit the needs and nature of the organization.

- Conduct strategic planning to clarify the organization's mission, strategic goals, objectives and action plans (that specify who will do what and by when).
- In the planning, consider learning and evaluation results from day-to-day operations.
- Ensure that strategic priorities (goals, objectives, etc.) are associated with a relevant Board Committee that monitors achievement of those goals and objectives. For example, ensure the Board Programs Committee oversees program goals, the Board Personnel Committee oversees staffing planning and development, etc.
- Update each Committee's work plan and each staff position's job description and performance goals to reflect the latest strategic goals.
- Communicate the Strategic Plan to all key stakeholders.
- Ensure the Strategic Plan is approved by the Board and its implementation is monitored by the Executive Committee.

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### **Program planning**

Form a Board Programs or Marketing Committee to oversee the following actions:

- Conduct market research to clearly identify:
  - 1) Unmet community needs to meet with programs.
  - 2) Which groups of clients will be served by which programs.
  - 3) What outcomes to achieve with each group of clients.
  - 4) Methods to effectively meet the needs of each group.
  - 5) Potential collaborators and competitors.
  - 6) What resources are needed to provide the services.
  - 7) The cost of those resources.
  - 8) How the program should recover the costs.
- In the research, consider learning and evaluation results from day-to-day operations.
- Ensure program staff is resourced (clear roles, time, energy and expertise) to carry out their roles in the program.
- (Nonprofits rarely ask for help with "program planning," rather they ask for help with program advertising, even though program planning may be where they really need help.)

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### **Management development**

Form a Board Personnel Committee to oversee the following actions:

- Train staff in the standard roles of Board and Chief Executive Officer.
  - Establish up-to-date policies and procedures regarding creating staff positions, recruitment and selection of staff, how performance goals are established, how delegation is conducted, how performance issues are addressed, and a compensation system commensurate with performance. Incorporate policies and procedures into a Personnel Policies Manual reviewed by an expert on employment laws and approved by the Board.
  - Develop skills in leadership and management by providing training in at least the following skills:
    - 1) Time and stress management.
    - 2) Planning process, including setting direction (vision and goals), methods (strategies) to achieve goals and resource planning to implement strategies.
    - 3) Communication, written and spoken, for example, presentations and meeting
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management.

- 4) Basic skills in supervision, such as setting goals, delegating, giving feedback and evaluating performance.
  - 5) Conflict management.
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### **Staff development**

Form a Board Personnel Committee to oversee the following action plans:

- Conduct strategic and program planning for clear focus, roles and alignment of roles.
  - Ensure staff members receive specific performance goals.
  - Assess staff members' needs for training, resources and supervision to achieve goals.
  - Ensure effective supervision, including mutually established goals, delegation, feedback, performance reviews and rewards.
  - Obtain strong staff input about issues and how they can be addressed – ensure a participatory approach to leadership and management.
  - Establish and train staff in up-to-date personnel policies that conform to recent employment laws and regulations.
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### **Teamwork**

Form a Board Personnel Committee to oversee the following actions:

- Ensure up-to-date job descriptions and performance goals for each staff member.
  - Develop charters and work plans for teams, including:
    - 1) Purpose of the team.
    - 2) Results to be achieved by the team and by when.
    - 3) Resources available to the team.
    - 4) How decisions will be made.
    - 5) Roles on the team.
    - 6) How the communications will occur inside and outside the team.
  - Develop the staff and management appropriately.
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### **Financial management**

Form a Board Finance Committee to oversee the following actions:

- Conduct strategic planning, identifying resources needed to achieve strategic goals and the financial resources required to obtain and support ongoing usage of those resources.
  - Conduct program planning, identifying costs to develop programs and the expected revenue and expenses for each program.
  - Train Board members in how to review financial information.
  - Train staff about financial management, including how to document each financial transaction, generate financial statements, analyze those statements and report important information from the analysis.
  - Establish, revise and ensure ongoing implementation of fiscal policies and procedures to ensure effective and legal financial management and cash controls.
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### **Advertising and promotions**

Form a Board Marketing or Promotions Committee to oversee the following actions:

- Develop and implement an Advertising and Promotions Plan for each program and the organization overall that clearly identifies:
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- 1) Specific groups of clients served by the program.
  - 2) Unique benefits of the program to each group.
  - 3) What messages to convey to each group.
  - 4) How each message will be conveyed.
  - 5) Who will convey the message.
  - 6) When.
- Monitor status of implementation of the Advertising and Promotions Plan.
  - A Marketing Committee might also be responsible for marketing analysis, for example, for clarifying what community needs should be met by each program, what specific groups of clients should be served, and what competitors and collaborators exist for each program.
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### **Fundraising**

Form a Board Fundraising Committee to oversee implementation of the following actions:

- Conduct strategic planning to identify what programs are needed and how those programs should be integrated into the organization. A Board Planning Committee might oversee this strategic planning.
  - Conduct program planning to clearly identify which community needs should be met, what outcomes to achieve, what methods to achieve outcomes and cost of resources to develop programs.
  - Orient fundraisers (internal or external) about program clientele and program results.
  - Develop and implement a Fundraising Plan specifying what monies need to be raised, what funding mix is desired (among individuals, corporations, foundations and government), what donors to approach, how to approach them, when to approach them, who will approach them and how funds will be administered.
  - For revenue development, conduct market research to identify fees-for-services opportunities, then conduct feasibility studies on each of the most likely opportunities, and then business planning for each of the best opportunities.
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### **Program evaluations**

Form a Board Program Evaluation or Programs Committee to oversee the following actions:

- Conduct program planning to clarify program process, goals and/or outcomes.
  - Train program staff about evaluation, including its benefits and how to identify:
    - 1) Types of evaluation.
    - 2) What type to use.
    - 3) What information is needed for each type.
    - 4) How to get that information.
    - 5) How to analyze and interpret it.
    - 6) How to report it.
  - Conduct a program process evaluation to determine the effectiveness and the ineffectiveness of the program process.
  - Conduct a program goals evaluation to determine achievement of goals.
  - Conduct a program outcomes evaluation to determine what benefits were realized by participants.
  - Determine how to package and share evaluation findings with marketing, fundraising and
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future planning activities.

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