



**Benchmarks of
Excellence for
the Nonprofit
Sector
Webinar
February 16, 2011**



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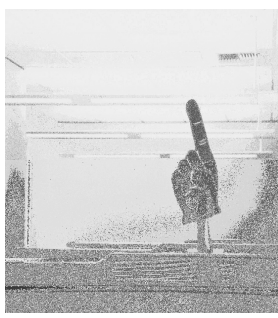



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Objectives

- ✓ Learn about excellence
- ✓ Informal evaluation
- ✓ Celebrate your successes





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What Is Benchmarks of Excellence

- ✓ Education, evaluation and planning tool
- ✓ Understand, measure, celebrate and build organizational excellence



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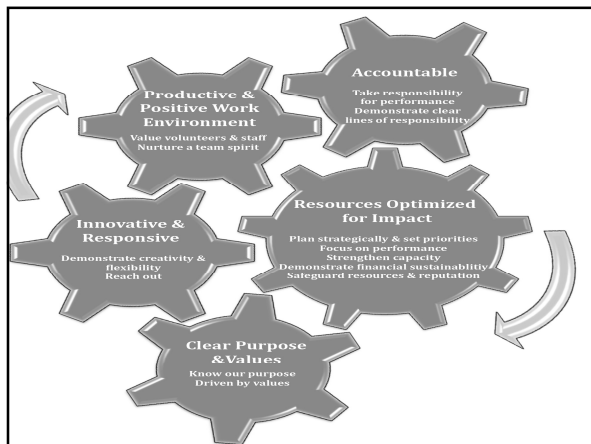
What Is Benchmarks of Excellence

- ✓ Ideal standard
- ✓ Birds eye view
- ✓ Dashboard indicators



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1. Do we have a clear purpose and values

“The more you know about where you are going, the closer you are to getting there.”



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1. Clear Purpose and Values

➤ Know your purpose

- ☐ Reviewed, targeted, unique, helps in decision-making



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1. Clear Purpose and Values

➤ Driven by values

- ☐ Written and operationalized



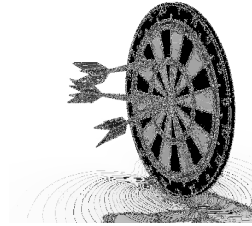
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2. Are our resources optimized for impact?

"The nonprofit organization is not merely delivering a service, it uses a service to bring about a change in a human being. Until that has happened, it has had no results, only good intentions."



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2. Resources Optimized

- Plan strategically and set priorities
- ☐ Strategic plan that drives annual plan and budget
- ☐ Clear set of priorities, not a cumulative list
- ☐ Clear what cannot do and have criteria for evaluating ideas and opportunities



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2. Resources Optimized

- Focus on Performance: Program
- ☐ Identify and monitor the changing needs
- ☐ Describe outcomes and indicators
- ☐ Do formal evaluation
- ☐ Develop, revise policies and procedures



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2. Resources Optimized

- Focus on Performance: Financial
- ☐ Transparent and accurate system of reporting on our financial circumstances
- ☐ Demonstrated a track record of realistic budgeting
- ☐ Identified specific performance metrics



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2. Resources Optimized

- Focus on Performance: Human Resources
- ☐ Formal performance review of the Board, CEO and staff
- ☐ Measure the performance of committees
- ☐ Do cost benefit analysis of partnerships and collaborations



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2. Resources Optimized

- Strengthen Capacity
- ☐ Right people, in the right positions, doing the right work for the right reasons and with the right support



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2. Resources Optimized

- **Demonstrate Financial Sustainability**
- ☐ **Everyone would say that the organization has the financial means to make a significant impact on mission**



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2. Resources Optimized

- **Safeguard the resources and reputation**
- ☐ **Formal process to identify sources of risk, exposure, likelihood, and acceptability and then ensure there are policies and procedures and actions to address them**
- ☐ **The Board has the right skills, structure and composition to perform its duties and provide effective oversight**



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3. Are we accountable?

“To be persuasive we must be believable; to be believable we must be credible; to be credible we must be truthful.”



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3. Accountable

- Take responsibility for performance
- ☐ Strategic priorities, goals and annual plan are fulfilled
- ☐ Board meetings are focused on the most important issues
- ☐ If a Board member or staff is not performing, action is taken



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3. Accountable

- Demonstrate clear lines of responsibility
- ☐ Written description of the responsibility of Board versus CEO/staff
- ☐ Board and staff would say they agree with the outcomes and expectations assigned to them



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4. Are we innovative and responsive?



“The greatest threat to any organization is not the lack of ability or resources, but the failure of the imagination.”



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4. Innovative and Responsive

- **Demonstrate creativity and flexibility**
- ☐ **Different experiences, perspectives and skills are highly valued**
- ☐ **Identify and remove or mitigate barriers to new ways of working**
- ☐ **Environment allows for challenging of the status quo, the uncovering of assumptions and heated debate**



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4. Innovative and Responsive

- **Reach out**
- ☐ **Collaboration is a priority**
- ☐ **Explored technology as a way to engage**
- ☐ **People served have a clear voice**
- ☐ **Diversity is driven by mission and strategies, not just moral reasons**



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5. Do we have a productive and positive work environment?

“What is rewarding, gets done”.



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5. Productive and Positive work Environment

➤ Value volunteers and staff

- ☐ Appropriate resources are put in place to attract and keep the best volunteers and staff
- ☐ Formal process to ask about levels of satisfaction



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5. Productive and Positive Work Environment

➤ Nurture a team spirit

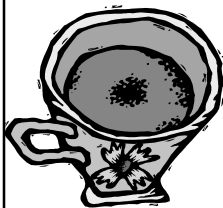
- ☐ You hear 'we' a lot, not 'them and us'
- ☐ Volunteers are actively engaged in meaningful work
- ☐ Make time to laugh and celebrate
- ☐ Manage expectations



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In Closing



***"By looking at what
we have
accomplished – the
half of the glass that's
full – we'll gain the
belief in ourselves to
do more , and to do it
bigger and better."***



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***Benchmarks of Excellence for the
Nonprofit Sector***

***To receive a copy of the checklist, please
contact:***

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