

Sustainability

Key Benchmarks for Building Organizational Sustainability

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The Sustainability Benchmarks have been developed by Anne Hays Egan from research that began in 1990, working on organizational benchmarks for success for her Nonprofit Quality Assurance Program which was used for about 7 or 8 years. The research then continued as part of updating and streamlining the organizational assessment, which became Sustainability. Research has included a study of benchmarks for success outlined by various experts in the field, and her work as Chair of the Alliance Gold Book Committee, which looked at best practices.

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The following include benchmarks that strong organizations have developed in order to build long term sustainability. Most effective nonprofits have strengths in many of these key areas, and often weaknesses in a few. This list of benchmarks provides a measuring tool for organizational strength, identifying strengths that should be maintained, and weaknesses that must be addressed. Certain items may be more crucial than others, depending on the organization and its priorities.

I. Vision & Mission

There is a written mission statement.

Board & staff can quote the mission statement.

Mission statement guides organizational decisions.

1. Planning

There is a written strategic plan, updated on a regular basis.

Planning process is guided by the board and ED.

Planning involves input from key stakeholders: staff, board, volunteers, clients.

2. Communications

There are regular internal meetings to communicate information.

There are regular written communication to ensure internal groups have information.

There are regular written communication with external stakeholders.

3. Programs & Services

Programs are clearly connected to mission.

Programs involve community and constituents, and reflect their needs and priorities.

Programs can demonstrate quality and effectiveness.

Programs can demonstrate outcomes.

Programs have strong reputation in the community.

4. Finance

Program based budgets are prepared and approved by the board.

Diversified income budget demonstrates funding from many sources.

There is a core base of ongoing funding to sustain the organization.

Income exceeds expenses by at least 3%-5%.

Cash reserve is at least 1-3 months' operating budget.

Organization has a plan for dealing with sudden changes in funding.

5. Fund Raising

Organization has a written fund raising plan for diversifying revenue.

Board members are involved with fund raising.

Organization has annual fund appeals for individual donations.

Community businesses provide support or sponsorships.

A database of donors is maintained.

Organization maintains regular contact with donors.

Community/fund raising events are held to build community relationships.

6. Marketing & Community Outreach

Marketing materials developed and used in the community.

Strategies guide community outreach work of staff and board.

Community knows about the organization and is supportive of its work.

Local policy makers know about organization and are supportive of its work.

Organization has ongoing relationships with local and state policymakers.
Organization works with other organizations and leaders on areas of mutual interest.

7. Board

Board is effective, focused on policy, oversight and governance.
Nominations process is ongoing, and new members are chosen based on skills.
The board reflects the diversity of the community.
Board members have clear roles and responsibilities.
Board has active committees.
Board understands the financial impact of its decisions.
Board is proactive, looking ahead at program and community needs, finance and funding.

8. Staff

Staff are effective at their jobs.
There is a low turnover rate.
There are competitive salaries and benefits.
Staff report they like their work.
Staff are recognized as excellent by peers in the profession.

9. Volunteers

They are recruited carefully for specific tasks.
Volunteers participate in planning and evaluation.
They are given formal recognition.

10. Administration & Systems

Organization has an outline of the systems and how they are to develop to meet needs.
There are adequate systems to support the programs and services.
Administrative staff are in place to support programs and services.

11. Technology & Computerization

Organization has a plan for upgrading technology.
Computers and software are adequate for work.
Email, web and listserves are used to communicate.

12. Diversity

Board reflects the diversity of the area.
Staff reflects the diversity of the region.
Diversity of culture, race, age and sexual preference are reflected in the organization.
Organization encourages a diversity of ideas and opinions.

13. Collaboration & Innovation

The organization is affiliated with a number of loosely affiliated collaborations.
The organization is involved in at least one intensive, formal collaboration.
Staff look for ways to leverage resources through collaboration.

Staff are encouraged to take initiative and solve problems, and have tools they need.
The organization considers ways to improve and change programs.
Board and staff regularly consider opportunities, leveraging or creating new resources.

14. Evaluation

The organization has a culture of evaluation; people are encouraged to track progress.
Program managers have implemented outcome evaluation in their programs.
Staff have the tools they need to collect data and measure.
Staff use findings to analyze progress and make plans for improvements.
