



Say What You Do: Mission & Relevance

1. Mission and Values

The organization's mission and values are in writing, board and staff understand how they guide the organization, and they are regularly communicated to relevant audiences.

2. Impact and Outcomes

The organization can describe the impact it hopes to achieve and uses data to drive overall strategies for achieving mission, programs, and services that connect its participants to the expected outcomes and organization's mission.

Do What You Say: Planning, Program Delivery, & Resource Management

3. Internal and External Information

The organization regularly solicits information from participants, community leaders, and other stakeholders regarding the appropriateness and quality of the organization's programs/services to guide priorities; while also gathering information about relevant trends and best practices to guide planning and priorities.

4. Written Plan for the Future

The organization has a written strategic plan developed with and approved by the board that includes:

- a. A description of the organization's priorities and activities given its mission and the current and future environment.
- b. Measurable program and financial goals tied to a timeline.
- c. Information gathered from the assessment of community trends, best practices, stakeholder input, participant satisfaction, and internal capacity that guides the creation of the plan.
- d. A financial plan which addresses the sustainability of the organization, protects the organization's assets, and directs the fundraising efforts of both the board and staff.

Throughout the year the plan guides the organization's decision-making and resource allocation.

5. Program and Financial Goals

Information on program and financial goals is collected routinely and summarized to monitor progress and make mid-course adjustments. The board and appropriate staff receive progress reports on program and financial goals at least quarterly for decision-making.

6. Risk Management

The organization has written policies or procedures understood by relevant board, staff, and volunteers to manage unplanned events and/or crises. A risk review is conducted annually for organization policies and facilities to ensure that participants, staff, and the organization's assets are adequately protected. The findings are reported to the board and executive management and action plans are implemented to make necessary corrections, taking a proactive approach to crises prevention.

7. Non-compliance

Instances of non-compliance with organizational goals, policies, and procedures are identified on a timely basis and corrective actions are implemented.

8. Human Resources

Staff and volunteers understand their responsibilities, reporting structure, and policies regarding leadership transitions which are clearly defined in writing. They are well qualified and trained to perform their roles; understand how their roles relate to the organization's mission; and staff participate in a structured annual review process that includes identification and review of performance goals and training/development needs.

9. Office and Programming Space

Facilities are safe and appropriate for the activity being offered and the participants being served.

10. Communications

Communication policies and practices are in place to ensure that internal and external audiences receive necessary and relevant information on a timely basis.

11. Collaborations and Partnerships

The organization seeks out, and routinely monitors, jointly developed collaborations and partnerships to yield mission-relevant benefits.

12. Service/Program Policies and Procedures

Service/program policies and procedures are in writing; updated regularly in accordance with best practices and appropriate regulations; and are understood and consistently followed by staff and volunteers.

Prove It: Documentation & Continuous Improvement

13. Evaluation of Organization Operations

The organization regularly reviews information on program delivery, program effectiveness, financial performance and human resource effectiveness to make improvements so that organizational operations are effective and efficient.

14. Financial Management

Internal controls for financial transactions are in writing in accordance with legal policies and generally accepted accounting principles; transactions are documented and summarized to share with the board at least quarterly to make any necessary changes to the annual budget plan.

15. Continuous Use of CME

The organization understands the Criteria for Management Excellence and continuously updates its progress even after achieving high levels on one or more criteria.