



FAMILY AND SOCIAL SERVICE AGENCIES

SURVEY SAID

**WE ASKED EXPERIENCED LEADERS OF FAMILY AND SOCIAL SERVICES ORGANIZATIONS,
“WHAT DO YOU HAVE TO DO WELL TO BE EFFECTIVE AND SUSTAINABLE?”**

Be a relentless champion for meeting children's developmental needs! Otherwise, what's the point?

Make sure your programs meet a current community need. Document the need with surveys/polls/testimonials.

Be sure programs address the mission. It's easy to drift!

Plan programs well. Measure their impact.

Board members must participate, contribute and advocate.

Ensure frequent, transparent communication between lead staff and board.

Build key community partners: schools, other youth-serving organizations, funders.

Diversified fund development efforts must consistently meet targets.

Revenue comes from fees for service and programming, contributions, sponsorships, rental income and endowment.



Gain the capacity to create programs to meet changing needs while maintaining current services.

Programs build on participants' strengths, set high expectations and hold participants accountable for making improvements.

Lead staff is adept at multiple roles: vision/leadership/manager/advocate/marketer/fundraiser.

Policies and plans minimize risk and withstand emergencies: insurance, financial reserves and communication plans are key.

Keep a cash reserve in case of emergency.

Key financial reports include:

*Annual budget
Monthly budget-to-actual comparisons
Statement of cash flow
Balance sheet*



Talk about it.

Does your organization do these essential things well? *If not, one of our Nonprofit Toolbelt Grants might be able to help!*

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START WHERE YOU ARE BAR

Building a strong, durable and impactful nonprofit is a difficult thing to do. **BUT YOU'RE NOT IN IT ALONE!** Gather your board, some staff, parents and community leaders and fill out this survey. Your spot on our **Start Where You Are Bar** will help you decide your next areas of focus. Then tap into our Nonprofit Toolbelt Grants to help you study, compare, consult and even hire a mentor or coach.

To get started, simply place an X in the column that best describes where your organization stands on each topic.



HERE'S THE TOPIC:

HERE'S WHERE WE ARE:

	NEVER	SOMETIMES	FREQUENTLY	CONSISTENTLY	ALWAYS
A. MISSION					
1 Our programs and services address the thought(s) expressed in our mission statement.					
2 We develop new programs/services only when needed to accomplish our mission.					
3 We modify our programs/services to meet community needs, but only if they further our mission.					
B. GOVERNANCE					
1 We maintain clear and timely communication between our board and staff leaders.					
2 We effectively and consistently train and develop our board.					
3 Our board members are aware of their financial and legal responsibilities.					
C. VISIBILITY					
1 There is consistency between what we say we do and what we do.					
2 We maintain positive public relations with the people and community we serve.					
3 We use various media to communicate about our work (website, social media, in-person, etc.)					
D. COMMUNICATIONS					
1 Our board supports our mission, programs and services.					
2 Our internal communications are clear and effective.					
3 We are open and honest when communicating with funders.					
E. PROGRAMMING					
1 We offer programs and services based on accurate needs assessments.					
2 We measure program outcomes and make changes based on our assessment.					
3 We have the capacity to create new programs while maintaining quality service.					
4 Our programs build on client strengths, set high expectations and hold participants accountable.					



HERE'S THE TOPIC:**HERE'S WHERE WE ARE:**

	NEVER	SOMETIMES	FREQUENTLY	CONSISTENTLY	ALWAYS
F. REVENUE GENERATION					
1 Our fundraising efforts are well organized, and fundraising targets are met consistently.					
2 We maintain sufficient reserve funds to meet expenses in case of emergency.					
3 Our financial decisions are made based on current budget and financial reports.					
G. FINANCE AND ACCOUNTING					
1 We regularly prepare and share financial reports with our board, including: annual budget, budget-to-actual comparison, cash flow statement and balance sheets.					
2 We pay all our bills in a timely manner.					
3 We set, and follow, a policy related to money owed to us.					
4 To guide our decision making, we monitor individual programs/classrooms, to understand whether they break even, add to our revenue or operate at a loss.					
H. STAFFING					
1 We have clearly expressed job descriptions for all employees and volunteers.					
2 We regularly conduct performance evaluations for all our employees.					
3 We measure and take actions for our employees' satisfaction with their work quality of life, including, but not limited to, compensation and benefits.					
I. ONGOING ASSESSMENT					
1 Our board and staff regularly review, and revise as necessary, our guiding documents.					
2 We ask questions to understand the needs of our internal and external stakeholders.					
3 We effectively assess our internal operations.					
J. COMMUNITY PARTNERSHIPS					
1 We actively seek partnerships with schools, service clubs, businesses and others that can help us further our work.					
2 We maintain mutually-beneficial relationships with partners to help us accomplish our mission.					
Count the number of Xs that you have in each vertical column and record them here:					

START WHERE YOU ARE BAR**Now, decide which of the areas above you want to improve:**

Consider your options for bringing about this positive change within your organization:

Choose a date NOW to re-do this survey and observe your progress:

Month _____ Day _____ Year _____

Color in the box that corresponds to your highest number.

NEVER	SOMETIMES	FREQUENTLY	CONSISTENTLY	ALWAYS
Your days at work might seem tough – maybe a few that require alternating IV's of coffee and chocolate.	It might feel like you're taking two steps forward and one step back – is there a GPS for nonprofits?	You've got it goin' on! Time to treat yourself to a bubble bath – after this board meeting, of course.	In short: YEEEESSSS! If you were abs, you'd be a six-pack.	WOW – time to take a load off and enjoy your success! Seriously. Go home, sit down, kick up your feet and breathe.