

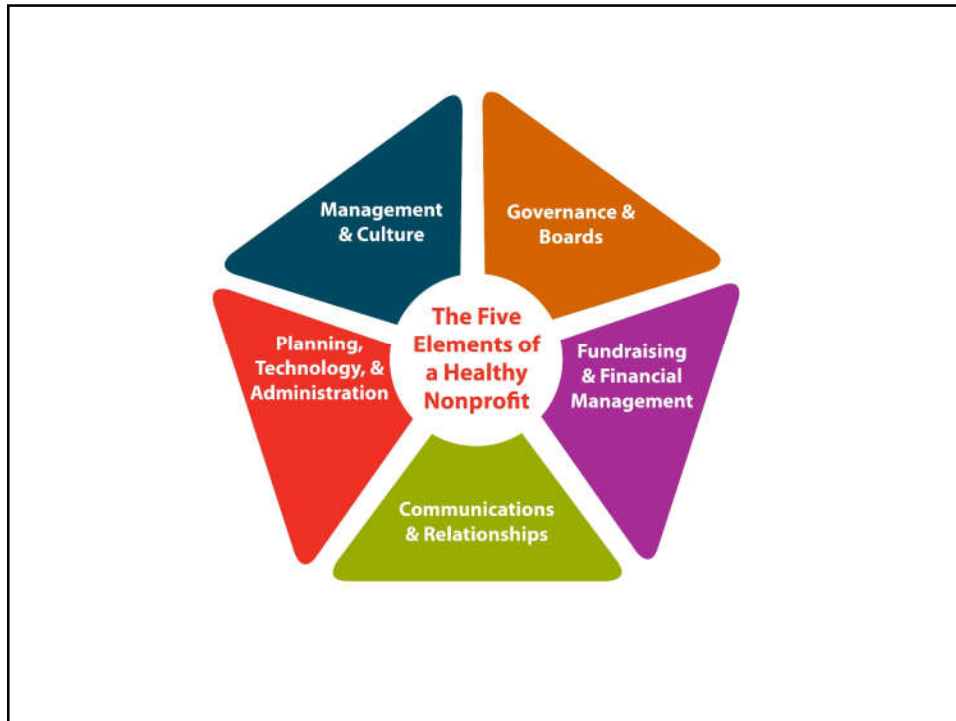
Five Elements Self-Assessment & Pathways



Purpose



- Make you aware of the Five Element of a Healthy Nonprofit framework, which you can use
- Give you access to our online self-assessment tool which you can promote to your clients
 - And then follow-up to provide services to address issues the assessment identifies
- Offer you a product you can provide called Pathways, which combines the assessment with a consultation



The screenshot shows the homepage of 501 Commons. At the top, a red arrow points down to the navigation area. The navigation bar includes the 501 Commons logo, the tagline "A Resource for Nonprofits. A Partner for Philanthropy.", a search bar, and menu items for Services, Resources, Assess, About, Donate, and Engage. The main content area features a banner with the text "Your mission is to build a better world. Ours is to help you succeed." and a featured article titled "The Commons" with the sub-headline "VIP Manager Corps Will Help You Grow Your Volunteer Program". The article includes a photo of children working with LEGO bricks and a logo for the "LIVE UNITED United Way VIP Volunteer Impact Partnership".

Your mission is to build a better world. Ours is to help you succeed.

The Commons
News, Tips, and Insights

[VIP Manager Corps Will Help You Grow Your Volunteer Program](#)

LIVE UNITED
United Way **VIP**
United Way of King County
Volunteer Impact Partnership

VIP Manager Corps a program delivered in partnership with the United Way of King County, provides nonprofits a temporary staffing boost to help them develop the essential tools and systems needed to effectively engage and retain high-value volunteers. We seek nonprofits to join the upcoming VMC cohort that runs from February to May 2017.

Extend your organization's capacity with 501 Commons

Five Elements Self-Assessment



- Five elements are broken down into 12 subsections
- Provides 10-12 standards for each of the 5 elements
- Total of 58 standards
- Educational and aspirational since standards describe the “best practice”

Example 1



2.10 BUDGETING AND FINANCIAL PROJECTIONS

- Does the organization prepare an annual budget based in part on analysis of trends?
- Does the organization have a financial projection beyond one year?

1	We have no formal budget or an informal budget that may change during the year.
2	We have an annual budget based on the previous year income and expense numbers. We do not do projections beyond one year.
3	We have an annual budget based on the previous year income and expense numbers that also incorporates expected changes. We occasionally do financial projections that go beyond the fiscal year.
4	We have an annual budget that is based on an analysis of trends. We maintain a projection that goes beyond the fiscal year including doing periodic three-year projections.
5	Not applicable

Example 2



5.9 EMPLOYEE HANDBOOK

Does your organization have an up to date employee handbook that includes at least the following components: 1) Organization mission and history, 2) Non-discrimination policies and reporting procedures, 3) Time off and leaves of absence policies, 4) Performance management, discipline and termination, 5) Health, safety and security, 6) Compensation and benefits, 7) Disclaimer that handbook is not a contract?

1	We do not have an employee handbook but provide employees with information about compensation and benefits.
2	We have an employee handbook that includes 3-4 components listed. The handbook has not been reviewed and revised for more than two years.
3	We have an employee handbook that includes 4-5 of the components listed. It has not been reviewed and revised within the last two years.
4	We have an employee handbook, revised within the last two years, which includes all of the components listed.
5	Not applicable



The Five Elements of a Healthy Nonprofit Self-Assessment

Save my progress and resume later | [Resume a previously saved form](#)

Page 1

Organization Information

Organization Name *

Address *

City *

State *

Zip *

Nonprofit Type *

Organization Budget Range *

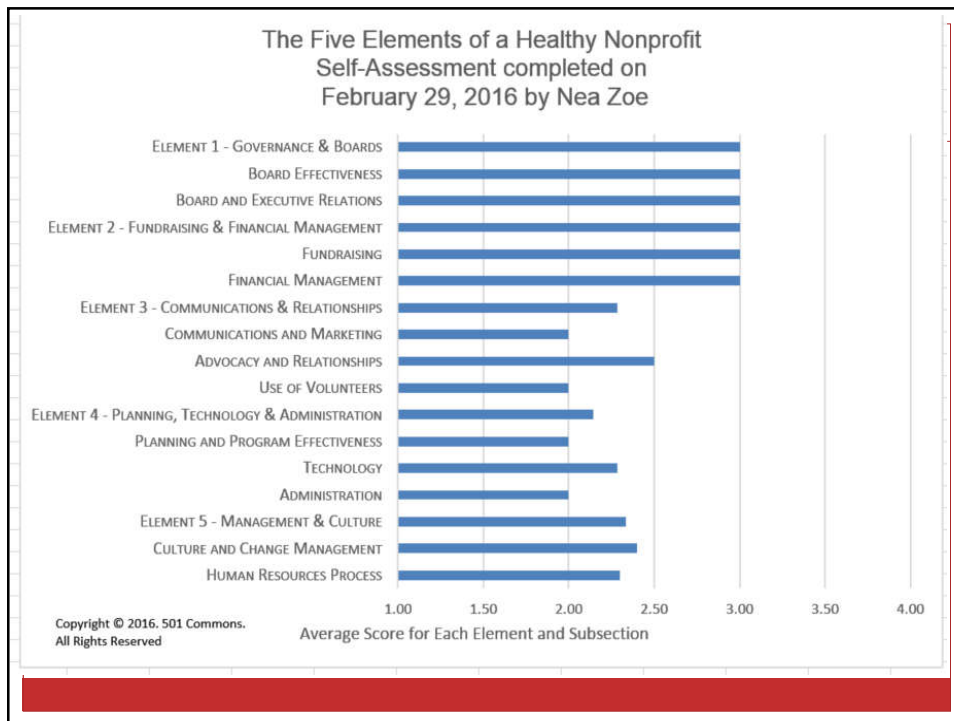
Round Number of Full Time Equivalent (FTE) employees *


Contact Information

Results reporting



- Report giving the standard and the level chosen
- Report showing the scores by subsection and the averages for each of the five elements
- Bar Graph showing the results by subsection (e.g. Financial Management and Fundraising)





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Five Elements Assessment: Index of Recommendations

Click on the number of corresponding to the level you chose for your organization to see the recommendation to move to the next level.

Element 1 - Governance & Boards

1.1 Mission/Vision	1	2	3	4
1.2 Board Roles and Responsibilities	1	2	3	4
1.3 Board Characteristics	1	2	3	4
1.4 Strategic Issues and Organizational Performance	1	2	3	4
1.5 Board Development	1	2	3	4
1.6 Organizational Support by Board Members	1	2	3	4

The BIG Idea



- Today:
 - Donors make donation decisions using overhead percentages.
 - A savvy donor may look at GuideStar too. Helpful but GuideStar primarily measure of fundraising capacity not overall capacity.
- Future:
 - Organizations can earn a rating (using the assessment + a verification audit)
 - Share their overall rating with donors/funders to demonstrate that they have “capacity.”

Three ways to use the self-assessment



- Good: One person at the organization completes the online form
- Better: A team at the organization downloads the assessment, scores it individually, comes together to agree on final answers. Those results are entered into the online form.
- Best: A team at the organization does the “Better” option above and then they contract with you for **Pathways** – a short consulting project to help them understand their results and plan for improvements.

What does this mean for you?



Use the assessment to strengthen nonprofits in your community and to build your business

1. Simply tell your clients or potential clients to visit 501Commons.org and click on “assess.”
2. Build assessment into planning products you already offer
3. Use it to market your services: “Use our free organizational self-assessment and then call us to discuss how we can help!”
4. Research: If you get a large number of local users, for a fee we can provide you with all the data from your community. Producing a research report or using the data for thought leadership communications can raise your profile.

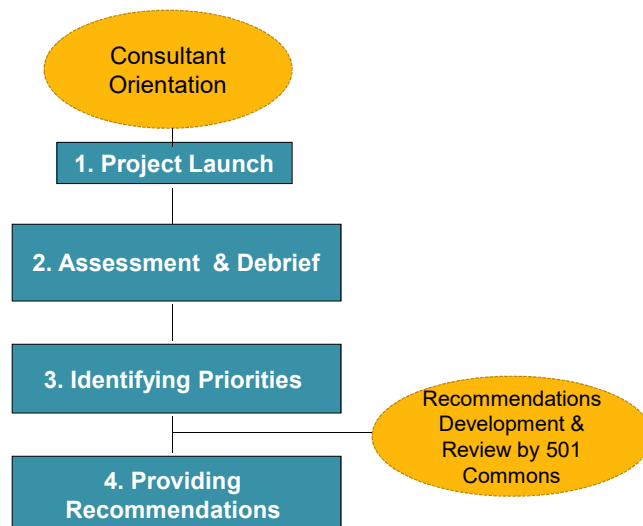


5. Offer Pathways

Brief 4-meeting consultation to

- Help organization complete the self-assessment as a team and debrief the results to determine final levels
- Identify three top opportunities for improvement
- Provide recommendations for next steps and resources

Pathways Model






Priority Matrix



Element	Sub-element	Questions	Consensus Score	Priority Rating	Weighted Priority
Governance and Boards	Board Effectiveness	1.1 - 1.5	4.00	High Priority	0.0
	Board and Executive Relations	1.6 - 1.8	3.00	Priority	2.0
Fundraising and Financial Management	Fundraising	2.1 - 2.4	2.00	High Priority	6.0
	Financial Management	2.5 - 2.11	1.00	Not an immediate priority	3.0
Communications and Relationships	Communications and Marketing	3.1 - 3.3	3.00	Not an immediate priority	1.0
	Advocacy and Relationships	3.4 - 3.7	2.00	High Priority	6.0
	Use of Volunteers	3.8 - 3.10	4.00	Priority	0.0
Planning, Technology and Administration	Planning and Program Effectiveness	4.1 - 4.4	1.00	Not an immediate priority	3.0
	Technology	4.5 - 4.11	4.00	High Priority	0.0
	Administration	4.12 - 4.14	2.00	Not an immediate priority	2.0
Management and Culture	Culture and Change Management	5.1 - 5.5	1.00	Not an immediate priority	3.0
	Human Resources Process	5.6 - 5.15	2.00	Priority	4.0



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Final Notes

- You can take the online assessment for your own organization or if you just want to pilot the assessment, just use the word “test” in your last name and in the fake organization name you use and that way we can clear the data after we send you the reports.
- Let me know if you are interested in doing the Pathways program as we will need to train you on the procedures, give you the agenda and report templates, etc.