



*Helping Organizations
Take the Next Step*

Building An Effective, Sustainable, Impactful Organization

“To make the greatest impact on society requires first and foremost a great organization, not a single great program.”

– Jim Collins, *Good to Great and the Social Sectors*

While there is no one formula for building a high-performance social sector organization, there are attributes and processes that all effective organizations have in common. The following is a checklist of some of those basic components.

A Clear and Compelling Vision

Brief, well-defined vision and/or mission statement

Statement of core values

Community assessment and feedback processes

Focused approach that is not redundant with other organizations' programs

Defined measures of success

Strong Leadership

Passionate, engaged board members

Clearly defined and consistently practiced roles and responsibilities

Strategic approach to board recruitment and succession

Board and staff are articulate advocates for the organization

Professional approach to staff and staff development

Clear expectations and accountability for board and staff

Written policies and procedures

Fund Development

Strategic fundraising plan
Demonstrated support and participation by the board
Balanced portfolio of funding sources
Constituent Relationship Management program in place

Marketing

Strategic marketing plan
Proactive communications to constituents and the community
Network of key influencers
Clear, jargon-free messaging
Strong, content-rich website
Great stories to demonstrate mission success

Financial Management

Computerized and up-to-date recordkeeping
Monthly financial statements
Well thought-out budget understood by leadership
Independent year-end audit or review
All required forms and filings are made in a timely manner
The entire board is knowledgeable about the organization's finances
Reserve funds
Endowments

John Heymann, CEO of NewLevel Group, has more than 30 years experience as an entrepreneur, business owner, and leader. A former Peace Corps volunteer, Managing Director of the Land Trust of Napa County, and Chief Executive Officer of Motto Kryla & Fisher, John is well known throughout Napa County for his ability to work with disparate groups to gain consensus and deliver results. John can be reached at 255-5555 x105, or jheyman@newlevelgroup.com.