

Benchmarking Your Organization's Development

A workbook by the
Institute for Conservation Leadership
with the generous support of the McKnight Foundation

Designed for organizations with a small to mid-sized staff and volunteer board

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What is Benchmarking?

“Benchmarking” is a process of measuring how the way that you do things compares to standard and best practices in the field. It involves:

- Identifying “indicators,” measures which tell you whether you’re really effective;
- Setting a standard you wish to reach—a “benchmark”—for those indicators;
- Tracking them;
- Analyzing the results and modifying your practices to meet your “benchmark.”

Many nonprofits already do a form of benchmarking when they set goals for their projects or campaigns, and choose indicators to tell them whether they’ve been successful. For example, a watershed group might set goals for water quality. They might work to limit runoff, and monitor the water quality to see what impact they’re having. But how do we measure an organization’s internal capacity, its ability to be effective and to sustain itself over the long haul?

At the Institute we’ve developed a set of questions to help you check your own organizational capacity. They describe an *ideal theoretical nonprofit with between one and ten staff members and a volunteer board*. Larger organizations, and all-volunteer groups, may find that many of these questions don’t fit them. And of course, they don’t fit any group perfectly.

We developed the benchmarks by analyzing the benchmarking tools we’d developed, as well as those of the Environmental Support Center, The Hawaii Community Foundation, the Maryland Alliance of Nonprofit Organizations, the River Network, CompassPoint Nonprofit Services, and Training Resources for the Environmental Community.

How Organizations use **Benchmarking?**

Two organizations that have used benchmarking are the Wilderness Center in Wilmot, Ohio, and the Earth Day Coalition in Cleveland. Both participated in the Institute's Northeast Ohio Sustainable Organizations Program. They carried out a self-assessment as a group. Then they chose areas to concentrate on and set goals.

The Wilderness Center

The Wilderness Center participants decided to strengthen its Board of Trustees. They set benchmarks, such as:

- Recruiting new trustees systematically to fill the group's needs:
- Supporting the Board with better materials; and
- Involving the Board in Fundraising

Earth Day Coalition

After the self-assessment, the Earth Day Coalition set goals in board development, strategic planning, and fundraising. They were able to recruit more strategically to renew their board. They embarked on strategic planning. They doubled their income, using a variety of new events and activities. Says Chris Trepal, the Coalition's co-director, "We set finite goals, and spent all our time comparing ourselves to our targets and checking our deadlines. It really gave us a framework to set mighty goals and go ahead and fulfill them."

The benchmarking process helps organizations to gain a perspective of their organizational development needs and challenges, to prioritize those needs, to develop a plan of action and to measure their progress. You and your organization can use it the same way. The tools are all here.

All you

need to do...

Our workbook helps you evaluate how your organization is doing at managing itself, in the space of about an hour and a half.

1. The workbook begins with 21 measurements—mostly numeric questions like the size of your budget, etc. These give a snapshot of your organization right now. They let you compare your answers and record your growth over a period of three years. The first year, you record your answers in the first column; for the next year, in the second, etc.
2. Then the workbook presents 46 ideal benchmarks, against which you can compare yourself. They're grouped into eight categories:
 - Vision and Planning
 - Programs and Campaigns
 - Fundraising and Resources
 - Budgeting, Accounting and Reporting
 - The Board
 - Staff
 - Members, Volunteers, and Leaders
 - Public Communications and Alliances

We think these are important questions for measuring most organizations' strength. *Some of them may not apply to your organization in particular.* That's completely normal; just leave those blank. The benchmark section isn't comparative year-by-year. You'll want to start fresh with a new copy each year.

3. Identify the most pressing needs. After each benchmark, we ask you to decide how important the benchmark is to your organization right now. At the end of each section, and at the end of the workbook, we ask you to reflect and choose the few that are really crucial.
4. Create your action plan for working on the most crucial issues. What goals would you set for your organization as you work on improving them: What steps would you take? (We find that writing down an action plan, and referring to it throughout the year, really make a difference in what people actually accomplish.)

And that's all. Put your workbook where you can find it and refer to it every couple of weeks to see how you're doing.

To make your benchmarking **even more effective...**

Use it in Your Organizational Team.

Benchmarking becomes really powerful when it's shared. The Earth Day Coalition's leaders transformed their organization by evaluating the organization's performance together, setting common goals, and measuring their progress regularly. They used the benchmarking process to create a shared vision and a systematic way of keeping themselves on track as they worked to achieve it.

At the end of this workbook, we suggest some steps that you can take to use this benchmarking workbook in your organizational team.

Tailor the Indicators to Your Organization.

Our benchmarks may suggest others you may want to track. Each benchmark can be broken down into more specific ones. For example, one benchmark reads, "The organization systematically selects and prepares new leaders." You might want to go into greater depth, and create a benchmark like, "The Organization finds ten new persons who accept leadership responsibilities during the year." or, "The organization holds five trainings for leaders during the year." Or, "The organization identifies at least twice as many well-prepared candidates for the board as there are board openings." If you think a benchmark is particularly important, then it may be useful for you to break it down further into its steps.

We've included space for your ideas. Add them at the bottom of each section, and then answer them too.

A SNAPSHOT OF YOUR ORGANIZATION

For: _____ filled out by: _____
(Name of your organization here) *(Your name)*

Here are some questions to help you capture some basic measures of your organization's work. These help give you a perspective over where you stand now. They also help begin to measure your growth, and to record it. Over the years, this will become an invaluable history that you can use when you're making a case to funders and supporters.

During the first year you use the workbook, put your answers in the first column. During the next, use the second, etc.

	Year 1 Date:	Year 2 Date:	Year 3 Date:
1. Number of full-time staff			
2. Number of part-time staff			
3. How many of these positions are new this year?			
4. How many staffers are new this year?			
5. Is the executive director new this year?			
6. How many volunteers worked in the organization over the last year?			
7. How many hours did they work?			
8. How many board members do you have?			
9. How many board meetings do you have each year?			
10. How many board meetings were attended by 75% or more of the directors?			
11. How many members do have now?			
12. How many persons contributed financially over the past year?			
13. Over the past year, have you decreased or expanded program areas or issues? (Decreased a lot/decreased a little/stayed the same/increased a lot/increased a little)			
14. What percentage of your programs have measurable goals?			
15. Over the past year, what training, mentoring, consulting services or resources have you used to build your organization? During Year 1:			
During Year 2:			
During Year 3:			

16. Your annual budget (revenue) planned for this year.			
17. Percentage of your budget that comes from			
• foundation grants:			
• from membership dues:			
• from donations made by individuals			
• from “planned giving”, including bequests in wills:			
• from government contracts or grants:			
• from corporations:			
• from events:			
• from self-generated income:			
• sales, fee for service or interest:			
18. Last year, what percentage of its planned budgeted income did the organization actually raise?			
19. What percentage of this year’s budget revenue was already committed by the beginning of your fiscal year?			
20. How many months operating reserve do you have now?			
21. How often do the Executive Director and Treasurer create or review financial statements?			

BENCHMARKS

For each benchmark, circle a number from “1” (not or never true) to 5 (always or absolutely true) to describe how well the benchmark describes your organization.

Then decide how important this particular benchmark is to your organization right now a “1) might mean it doesn’t matter at all, and a “5” might mean that it matters very much. If you think a benchmark is important, make a note or two to yourself about the goals you’d set to improve for the next year.

VISION & PLANNING

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen’t matter 5-matters a lot	What goals would you set	Why we ask
Vision and Goals The organization has a written vision statement and/or a mission statement, which is up-to-date and is used to guide its choice of activities.	1 2 3 4 5	1 2 3 4 5		Mission and vision statements help the organization focus on what is should do, among all the various possibilities. They also help attract and recruit new members, volunteers and board members.
Strategic Plan The organization has a current written strategic plan, approved by the Board, with clear and agreed-upon goals.	1 2 3 4 5	1 2 3 4 5		When organizations grow and their programs expand, they need to align their programs with their mission and with their fundamental values. Strategic planning provides a framework for annual planning and goal-setting. Young organizations may not need a strategic plan right away.
Annual Plan The organization creates an annual plan with measurable goals and objectives. The annual plan is aimed to achieve the strategic goals.	1 2 3 4 5	1 2 3 4 5		The strategic goals serve as a framework for annual evaluation sessions and an annual plan, which becomes the basis for program planning, budgeting, and fundraising planning.
Evaluation Board, staff and other important participants got together and honestly evaluated the organization’s performance during the past year.	1 2 3 4 5	1 2 3 4 5		Annual evaluations of the organization’s performance are an opportunity to learn and to set new goals for the future. New insights arise out of candid, non-judgmental evaluations involving staff, Board, volunteers and other key groups. Why set goals if you don’t evaluate?
<i>Are there more specific benchmarks you’d like to set for planning? Perhaps you’d like to create a planning committee, or begin to do annual evaluations of the program. Write your own goals here!</i>				
Goal:	1 2 3 4 5	1 2 3 4 5		
Goal:	1 2 3 4 5	1 2 3 4 5		

Notes to Yourself

Right now, what we do well in the area of developing a shared vision and plan is...

Our greatest challenges in the area of developing a shared vision and plans are...

Some steps toward overcoming those challenges might be...

PROGRAMS & CAMPAIGNS

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Choosing Programs Strategically During this year, you chose your programs, projects and campaigns to achieve your strategic goals. (They're not just a collection of projects and activities.)	1 2 3 4 5	1 2 3 4 5		By using strategic goals and other criteria to choose activities, organizations take control of their future. Otherwise, it's easy to just react to crises and to spread one's self too thin.
Monitoring Goals Programs have measurable goals (indicators). You regularly monitor them to see if you're meeting those goals.	1 2 3 4 5	1 2 3 4 5		By regularly tracking program indicators, organizations know if they're delivering the service they want to. They can make adjustments if it's needed. But it's easy to neglect monitoring in the hubbub of every day.
Building Support Your programs and campaigns excite your members and other constituents. They strengthen your group financially and in other ways.	1 2 3 4 5	1 2 3 4 5		Well-designed programs and campaigns capture the imagination of your supporters. They attract new volunteers, new donations, and more support. When they end, you're stronger than you began.
Program Success Over the past year your programs actually met their goals, or were changed so that they can meet them in the future world.	1 2 3 4 5	1 2 3 4 5		Successful nonprofits "learn." They react flexibly to the constant change in their programs and the outside. They have the courage to set high goals, to fail and to improve as a result.
<i>Create your own program benchmarks here! You probably have specific goals for your programs that you'd like to measure, or for setting up ways to monitor and evaluate them. Try those here!</i>				
Goal:	1 2 3 4 5	1 2 3 4 5		
Goal:	1 2 3 4 5	1 2 3 4 5		

Notes to Yourself

Right now, what we do well in planning and monitoring our programs and campaigns is...

Right now, the greatest challenges we face in planning and monitoring our programs and campaigns are...

Some steps toward overcoming those challenges might be...

FUNDRAISING & RESOURCES

	Does this describe your organization? 1-not true 5-always true	Does this matter right now 1-doesn't matter 5-matters a lot	What goals would you set	Why we ask
Fundraising Plan The organization has a written fundraising plan, based on the annual plan. The fundraising plan has specific goals and its own budget.	1 2 3 4 5	1 2 3 4 5		Usually, fundraising planning follows annual planning. It ties into budgeting. Everyone who will be fundraising participates. It usually begins with an evaluation of the previous year's experience and then projects for the coming year.
Diversified Funding Sources The organization's fundraising sources are diversified enough that its income is predictable and it achieves its full budget. (One measure: No more than 30% of the organization's budget comes from any one source other than dues and individual donations.)	1 2 3 4 5	1 2 3 4 5		Many organizations begin with a single source of funds—a grant or dues. In order to get more stability, they work to diversify. Many seek to draw their income from at least four of the following sources: foundations, government, individual contributions, memberships, events, businesses, planned giving, sales and earned revenue.
Tracking Donations The organization tracks each donation in a computerized database, acknowledges it promptly, and can show that it's used as the donor expected.	1 2 3 4 5	1 2 3 4 5		By thanking promptly, respecting donor confidentiality, and seeing that the money is used the way the donor was told it would be, good fundraisers get repeat donations.
Cost Effective Fundraising is cost-effective. It consumes less than a third of the total revenue.	1 2 3 4 5	1 2 3 4 5		Donors aim to support the organization's programs and mission, not its fundraising costs. But most new fundraising initiatives have higher startup expenses.
<i>Create your own program benchmarks here! You probably have specific goals for your fundraising you'd like to measure. Perhaps you want to reduce your dependence on grants below a certain level, or create a fundraising plan. Write those goals here.</i>				
Goal:	1 2 3 4 5	1 2 3 4 5		
Goal:	1 2 3 4 5	1 2 3 4 5		

Notes to Yourself

Right now, what we do well in fundraising is...

Right now, our greatest challenges in fundraising are...

Some steps toward overcoming those challenges might be...

BUDGETING, ACCOUNTING & REPORTING

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Budget The organization has an annual budget which reflects the organization's goals. The budget is reviewed and approved by the Board.	1 2 3 4 5	1 2 3 4 5		The annual budget is a key planning document. The Board uses it to see that the organization uses financial resources well to achieve its mission. Using the budget, the Board monitors income and expenditures.
Accounting System The accounting system gives an understandable, up-to-date picture of the organization and its programs. It meets Generally Accepted Accounting Principles (GAAP).	1 2 3 4 5	1 2 3 4 5		Good accounting systems provide useable information. The chart of accounts mirrors the program activities, and helps track program execution. It is kept current and gives enough information for good decisions.
Internal Controls There are "internal controls" on financial transactions, which prevent people in the organization from misusing funds.	1 2 3 4 5	1 2 3 4 5		Fraud and misuse of funds are bigger problems in non-profits than most think. Usually, groups require that different persons receive, disburse, record and reconcile income and expenses.
Financial Audit If the budget is above \$300,000, or if grants require it, then the organization has an annual audit by an independent CPA. The audit is reviewed by the Board, and its recommendations are implemented.	1 2 3 4 5	1 2 3 4 5		As organizations grow, donors require more financial reports, including audits. A good audit serves as a stamp of approval for fundraising. It informs the Board of problems, gives recommendations, and helps organizations improve their accounting systems.
Reporting The organization produces the necessary reports, including tax returns and an annual report for the public.	1 2 3 4 5	1 2 3 4 5		Nonprofits must legally produce tax reports. They should also offer an annual report detailing at least the program activities, Board members, and budget and financial data.

THE BOARD

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Board Meeting Preparation Board meetings are well planned. The agenda is agreed upon between the executive director and the Board Chair. The agenda and information for decision making is sent to members well in advance of the meeting.	1 2 3 4 5	1 2 3 4 5		Good Board meetings happen thanks to advance planning. Board officers <i>and staff</i> must invest their time to have productive meetings.
Board Decision-Making The Board's decisions give the organization a solid basis to move forward. The Board decides issues quickly enough, with good information and open discussion among everyone who needs to be there.	1 2 3 4 5	1 2 3 4 5		On key issues, the organization needs direction from the Board. Delayed or conflictive decision-making exhausts energy and misses opportunities.
The Board makes decisions through a process which everyone understands and agrees to. The process doesn't get in the way of important discussion.	1 2 3 4 5	1 2 3 4 5		A good process smoothes decision making, limits unnecessary conflicts and uncovers all the important points of view.
Board Minutes The Board records its decisions and maintains records. Board members refer to the records when necessary.	1 2 3 4 5	1 2 3 4 5		Most boards have a "Secretary" to keep the minutes, which make clear to everyone that the group's positions and decisions are.
Composition and Renewal The organization has a Board with members: <ul style="list-style-type: none"> • who are committed to the mission • who have the skills and experience the group needs • and who represent those groups involved in the organization's work 	1 2 3 4 5	1 2 3 4 5		Most groups start with small boards. If they grow, they add members who represent more of the diversity of people they work with, and who bring new capabilities like fundraising or accounting.

Board members leave and new members are added regularly. The Board recruits people with needed expertise and commitment who represent the diversity of its community. It orients and prepares them, with written job descriptions for the individual members and the Board as a whole.	1 2 3 4 5	1 2 3 4 5		Steady, planned recruitment of capable Board members builds the broad base and brings new opportunities and support.
Board Committees <i>(For those groups with Board committees :) The Board uses committees to make its work more efficient. It gives them clear job descriptions and goals, and the committees fulfill those.</i>	1 2 3 4 5	1 2 3 4 5		If the organization grows, the Board's responsibilities do too. Committees can make its work more efficient. Effective committees also increase the Board's capacity and expertise, and test potential new Board members.
Board Delegation The Board supports the staff and volunteers who manage programs by giving them clear goals and policies, and then allowing them to work without further interference. (Board members know the difference between their roles as volunteers and as directors.)	1 2 3 4 5	1 2 3 4 5		Some boards are very much involved in the day-to-day work. Those in charge of programs may feel they're being micro-managed and don't have clear goals.
Over the past year the Board and Executive Director (ED) established annual goals for the ED and the Board evaluated the ED using them.	1 2 3 4 5	1 2 3 4 5		The Board should see that the ED and the organization know what's expected of them and how they'll be evaluated. It should begin the healthy habit of annual evaluations, even when things are going well.
Board Financial Oversight The Board Treasurer and staff create regular (usually monthly) financial reports, which clearly show the organization's financial position, its income and expenses, what activities relate to, and how they compare to its budget. The Board reviews the reports at its meetings.	1 2 3 4 5	1 2 3 4 5		Staff manages the finances and reviews them with the Treasurer, who helps present them to the Board. The Board makes sure that the finances are sound and that resources go where they should.
Board Outreach Board members understand the programs and represent the organizations goals and programs to the press and society at large.	1 2 3 4 5	1 2 3 4 5		The Board represents the organization to the community, and must know the programs well enough to present them.

Board Fundraising All members help raise significant resources for the organization or make a substantial donation on themselves.	1 2 3 4 5	1 2 3 4 5	If an organization chooses to have staff, Board fundraising is essential. Boards may help open doors to major donors, foundations or corporations.
<i>Create your own program benchmarks here! You probably have specific goals for your Board that you'd like to measure. Perhaps you want better participation at meetings, or more public outreach from Board members. Write those goals here.</i>			
Goal:	1 2 3 4 5	1 2 3 4 5	
Goal:	1 2 3 4 5	1 2 3 4 5	

Notes to Yourself

Right now, what we do well in our Board's work is...

Right now, our greatest challenges in having an effective Board are...

Some steps toward overcoming those challenges might be...

STAFF

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Staff Expertise The organization's staff has the expertise and commitment needed to carry out its programs.	1 2 3 4 5	1 2 3 4 5		As the programs grow and change, has the staff's expertise kept pace? Has the organization set its standards high and recruited the best.
Adequate Pay The organization offers pay and benefits which are good enough to attract and keep qualified staff.	1 2 3 4 5	1 2 3 4 5		Nonprofits that work to improve the world should begin in their office. Many staff members first join because of their commitment to the cause, but most need competitive pay to stay long-term.
Manageable Workload Staff members have a manageable work load and the organization takes measures to avoid staff burnout.	1 2 3 4 5	1 2 3 4 5		Good managers prioritize the work and don't overload employees. They encourage staff members to rest and recharge themselves with vacation and outside activities.
Adequate Office & Systems The organization gives staff the office space, computer technology, equipment, and the resources it needs to be effective.				Working conditions affect the staff's morale. Old or unreliable equipment frustrates employees, who want to make an impact on the world, not to do battle with their equipment along the way.
Training All staff receive training or professional development to help them stay up-to-date and to expand their capabilities.				Training helps employees be more productive. They grow professionally, and have a chance to reflect on their jobs and the organization.
Work Plans Staff members have annual work plans with clear and challenging goals, linked to the organization's strategic goals. The plans are reviewed and updated at least quarterly.				Clear annual work plans align staff members with the organization's strategic goals, give them a clear mandate, and grant them the freedom to work creatively.
Regular Evaluations Staff members are regularly evaluated in writing against goals of their work plans.				Annual evaluations are a standard practice too often neglected when other crises arise. If evaluations are put off when all is well, it's harder to initiate them when there are problems with staff performance. It's easiest to do them every year.
Staff Initiative Staff members quickly resolve those problems (even interpersonal problems) which are within their power.				A clear sign of a well-managed organization is a staff which feels empowered to resolve problems. The best staffs feel the security to address even interpersonal difficulties productively.

Support for the Board The Executive Director and staff members dedicate time and effort to helping the Board function well.	1 2 3 4 5	1 2 3 4 5	Top-notch staff facilitates interactions with the Board, shows respect for it, initiates and maintains structure for Board work, anticipates changes and warns the Board, and keeps it informed. It helps Boards rise to their increased responsibilities in a growing nonprofit.
<i>Create your own program benchmarks here! You probably have specific goals for your staff that you'd like to measure. Perhaps you'd like to see staff members take specific training or be paid at the same level as similar organizations. Write those goals here.</i>			
Goal:	1 2 3 4 5	1 2 3 4 5	
Goal:	1 2 3 4 5	1 2 3 4 5	

Notes to Yourself

Right now, what we do well for managing our staff is...

Right now, our greatest challenges to having a happy, effective, well-managed staff are...

Some steps toward overcoming those challenges might be...

MEMBERS, VOLUNTEERS AND LEADERS

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Recruitment During this year, the organization recruited as many new members as it needed and could reasonably serve.	1 2 3 4 5	1 2 3 4 5		A good program brings in enough members to help the organization reach its goals for fundraising, program and outreach, without overtaxing its membership services.
Systematic Recruiting The organization recruits and manages volunteers systematically. It has a plan and goals for its work with volunteers.	1 2 3 4 5	1 2 3 4 5		Volunteer programs usually require a process for recruiting, preparing, supervising, evaluating and honoring the volunteers.
Development of Leaders The organization systematically selects and prepares new leaders from among its members, volunteers, and the general community.	1 2 3 4 5	1 2 3 4 5		Many nonprofits have systems for recruiting and preparing Board and volunteer leaders. Without such systems the task of renewing leadership can be neglected.
<i>Create your own program benchmarks here! You probably have specific goals for your members and volunteers that you'd like to measure. Maybe you just want to set goals for membership, or perhaps you want to identify leaders for a specific program. Write those goals here.</i>				
Goal:	1 2 3 4 5	1 2 3 4 5		
Goal:	1 2 3 4 5	1 2 3 4 5		

Notes to Yourself

Right now, what we do well in recruiting volunteers and developing leaders is...

Right now, our greatest challenges in recruiting volunteers and developing leaders are...

Some steps toward overcoming those challenges might be...

PUBLIC COMMUNICATIONS & ALLIANCES

	Does this describe your organization? 1-not true 5 –always true	Does this matter right now 1-dosen't matter 5-matters a lot	What goals would you set	Why we ask
Public Information The organization's stakeholders and target populations are well informed about its work.	1 2 3 4 5	1 2 3 4 5		When organizations communicate well with those they serve and work with, they get more cooperation and support, and funders hear about their accomplishments through word-of-mouth.
Media Coverage The organization receives the coverage it needs in the media that reach its target populations. It tracks this coverage.	1 2 3 4 5	1 2 3 4 5		Organizations cultivate the journalists and media that matter to their constituents and clients. They can show results in terms of coverage in articles, television programs, and other reports.
Electronic Communication The organization uses computers, e-mail and electronic media to streamline communications.	1 2 3 4 5	1 2 3 4 5		Electronic communications have become indispensable. E-mail, web-sites, and Internet fundraising can also help save paper!
Public Feedback The organization asks for and receives feedback from the people it works with, and then acts upon that feedback.	1 2 3 4 5	1 2 3 4 5		When organizations listen to feedback and make changes, they show they're truly committed to their mission. They inspire trust, learn, grow and attract others who are also committed.
Alliances The organization participates in alliances and collaborative groups which really advance the organization's goals and expand its influence.				Collaboration is an essential tool for nonprofits. We're all stretched too thin to address issues alone, and we don't have time to participate in alliances which don't advance our organization's goals. Choosing the right alliances and collaborating well in them, requires experience and good leadership.

Create your own program benchmarks here! You probably have specific goals for your outreach that you'd like to measure. Perhaps you want to regularly assess your participation in coalitions, or to get a certain amount of press coverage. Write those goals here.

Goal: 1 2 3 4 5 1 2 3 4 5

Goal: 1 2 3 4 5 1 2 3 4 5

Notes to Yourself

Right now, what we do well in outreach and coordination to the public and other groups is...

Right now, our greatest challenges in outreach and coordination to the public and other groups are...

Some steps toward overcoming those challenges might be...

What's really important now?

Setting priorities

You've just answered questions about these aspects of your organization:

- Vision and planning
- Program and monitoring
- Fundraising
- Budgeting and record keeping
- The Board
- Staff
- Members, volunteers and leaders
- Public communications & alliances

Review your answers and notice which questions you thought were most important to your organization. Look over your notes at the end of each section. Then answer these questions:

To survive, what aspects of your organization do you need to change or improve right now?

To take advantage of upcoming opportunities, what parts of your organization do you have to change or improve right now?

YOUR ACTION PLAN

After looking at this, I believe the major planning challenges that my (our) organization faces are:

In the next six months, I (we) will start working on those issues by:

Three specific steps that I (we) will take to carry out planning during the next six months are:

1. Who? _____ By when? _____

2. Who? _____ By when? _____

3. Who? _____ By when? _____

BENCHMARKING AS A TEAM

Done individually, benchmarking can help you manage your own work better, as you reflect on your organization's development and set directions. Done as a team, it can transform your organization. Together, you can identify areas you want to work on, set goals and develop a systematic way to monitor your progress as you work to reach your goals. Of course, this takes more time and is more complicated than benchmarking alone. But the basic steps are the same.

To begin, have each participant go through the workbook. Then gather together.

As a group, assess your organization's development.

1. Section by section, list the answer each person has given to each question. Beside the number of the question, write down everybody's answers.
2. Then look to see whether there are large differences in the answers. If there are, ask the participants to explain them. Do the differences come from:
 - Understanding the question differently?
 - Believing different things about the organization?
 - Having different information?

Is it important to have agreement about the question? It may not be, and in that case, you may want to move onto the next step. If it is, how can you reach agreement? Perhaps there's more information to be gathered.

Identify the benchmarks you do well on, and those that need work.

1. Calculate the average score for each answer. (Add up all the answers and divide them by the number of participants). Which are the topics that show the highest average scores? Those are probably your strengths. Congratulate yourselves for them.
2. Then identify those areas where the scores are lowest. Which of them are also the questions that participants felt were most urgent to address? Those are probably the areas you think are most important for your organization to work on—those which could really threaten the organization if you don't deal with them.
3. Finally, consider which areas might offer you the greatest benefits if you worked on them, or which hold the greatest opportunity for you. Those may also be your top priorities.
4. As a group, choose your top priorities for the coming year. One way to do this is simply to take a nonbinding "straw Poll," by giving each person three or more votes, and letting them cast a vote for each area of work. In this way, you'll find out which areas are likely to have the most interest on the part of participants. See if you can reduce the number of areas for your work to three. This may be easy, or it may take some discussion. In any case, focusing your efforts will make it easier for you to achieve the goals you do set. Your success will build momentum for next year.

Set goals and decide how to measure your progress toward them.

1. Consider the benchmarks you've identified as high priority. Discuss in the group:
 - Where do you want to be in a year or five years?
 - How would you know if you'd arrive there?
 - How would you measure your progress? (The ways you choose to measure your progress are called "indicators.")
2. Individually, have participants write down what they think would be reasonable goals for the next year for each indicator.
3. Share the goals with one another, then discuss them.
4. Reach agreement, and set your goals.
5. Then decide how you'll measure them and who'll be responsible for collecting the data.

Plan your next steps.

What are the individual steps on the way toward your goal? They may be obvious so that your group can plan them right now. Or you may need to do some research, or consult with mentors or sister organizations that have faced similar challenges. When you plan, make sure that the people who will carry out the actions are involved in deciding what they are. When you've decided the steps you'll take to reach your goals, write them down. You may want to include them as a part of your strategic or annual plan.

Make sure that you also plan how you're going to monitor your indicators for progress. Will you have updates at Board meetings? At staff meetings? On regularly scheduled conference calls? This ingredient is essential to turning your dreams into reality.

Monitor your progress regularly.

At regular times throughout the year, reread your goals and see how you're doing. Just looking through the list again will remind you of what you set out to accomplish, encourage you when you see your progress, and motivate you to include the organizational development in your ongoing activities. When you discuss your progress in a group, you may decide to modify your benchmarks, or to revise your action plan for reaching them. Hold yourselves to high standards, and you're likely to attain them.

In a year, evaluate yourselves and plan again!

If you're like folks in many organizations we know, you'll have made some real strides toward your goals. You'll also have new ideas for the future that you're creating together.