

# Principles & Practices

*for Nonprofit Excellence in Michigan*

Basic Infrastructure Checklist  
October 2009



Michigan Nonprofit Association

# Basic Infrastructure Checklist

UPDATED OCTOBER 2009

"If you have built castles in the air, your work need not be lost. That is where they should be. Now put the foundation under them."

~ Henry David Thoreau

The following list outlines the foundation for registered nonprofit organizations conducting business in the state of Michigan – the basic documentation, systems and support mechanisms that will enhance accountability, sustainability and effectiveness. **This tool is focused on WHAT YOU SHOULD HAVE IN PLACE rather than HOW you should utilize those systems/processes.** For the HOW TO, we recommend you consult the *Principles & Practices for Nonprofit Excellence Guide or Assessment Tool*. Generally, the Checklist recommendations are applicable to small grassroots organizations as well as to large, multi-site networks. Although many of the principles and practices detailed herein will be helpful to all nonprofits, they are specifically written for Michigan nonprofit corporations that are tax-exempt under 501(c)(3) of the Internal Revenue code and that are public charities (i.e., not private foundations).

The *Principles & Practices for Nonprofit Excellence* resources are designed as planning and assessment tools: they are not a form of accreditation or certification. They are simply resources to help your organization's leadership move forward with purpose and focus. Take some time to examine your files and make sure your foundation is complete. Review the list and note where individual items are located. If something is missing, find it or implement a process to create and/or secure it.

This is not a task of "busy work." Much of this information is needed to receive grant funding, as well as to demonstrate to the public, your clients, and prospective donors that you mean business. Some of these items are state or federal requirements: you will find them notated as **MI (Michigan law)** or **US (federal law)** in the "Legal" column. Failure to comply with regulations may mean that you unexpectedly shut your doors for good. But beyond the legal requirements, in a time of increased accountability and public scrutiny it can only help an organization to ensure its ability to answer questions quickly and accurately regarding its operations.

This document is one piece of a three-piece set which encompasses the framework for *Principles & Practices for Nonprofit Excellence in Michigan*. These copyrighted works, which also include the *Principles & Practices Guide* and the *Principles & Practices Assessment Tool*, can be downloaded at no cost from [www.MNAonline.org](http://www.MNAonline.org).

## ADDITIONAL RECOMMENDED RESOURCES:

- ◆ Staying Legal for Michigan Nonprofits – [www.stayinglegalmi.org](http://www.stayinglegalmi.org) – provides a listing of state and federal requirements, plus links to relevant forms and resources.
- ◆ Michigan Nonprofit Management Manual – [www.MNAonline.org](http://www.MNAonline.org) – more in-depth information on the daily management of a nonprofit corporation.

This checklist is a compilation of many documents and resources with significant feedback from nonprofit practitioners and consultants throughout the state of Michigan. We appreciate the collective wisdom of those willing to share their experience and insight. For further information about any of these topics, contact the Michigan Nonprofit Association or any of the Management Support Organizations found at [www.MNAonline.org](http://www.MNAonline.org).

Yes	No	In Progress	<b>PRINCIPLE: Communications</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	External Communications/Public Relations Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Internal Communication Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marketing Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Media Communications Plan and Procedures	

Yes	No	In Progress	<b>PRINCIPLE: Evaluation</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountability and Monitoring Systems	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Environmental Scan and/or Community Needs/Assets Assessment	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Formative Evaluation Plan and Systems	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Outcome Evaluation Plan and Systems	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Program Evaluation Plan and Systems	

Yes	No	In Progress	<b>PRINCIPLE: Financial Management</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Asset and Cash Management Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Audit Committee Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Budgets (revenue/expenses)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bulk-Rate Postage Permit	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cash Flow Projection	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Chart of Accounts	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contract Management Policies and Procedures (bidding system, contracts, evaluation and monitoring tools)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documentation of Accounting Policies and Systems (meet Financial Accounting Standards Board (FASB) and/or Government Accounting Standards Board (GASB) requirements)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employee Expense Reimbursement Policy and Procedure, including Cash Advance (if applicable)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Financial Records Retention Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Internal Control Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Policy Statement	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IRS Form 990, IRS 990-EZ or 990-N	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lobbying Expense Policy and Procedures	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Monthly Financial Statements with Balance Sheet	

Yes	No	In Progress	<b>PRINCIPLE: Financial Management, continued...</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Nonprofit Corporation Information Update	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Payroll – federal, state and local quarterly withholdings/filings	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Petty Cash Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Signature Authority	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Spending Limits Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UBIT (Unrelated Business Income Tax) Reporting	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Whistle-Blower Protection Policy (confidential process for reporting suspected financial fraud)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Year End Financial Statement with Balance Sheet	MI

Yes	No	In Progress	<b>PRINCIPLE: Fundraising</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Case Statement	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do Not Call, Do Not Fax, Do Not Email Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donor Database (contributions/restrictions)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Donor Recognition Plan (include provisions for privacy)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fund Development Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fundraising Budget and system to track expenditures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gaming License, Liquor License, other applicable licenses	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gift Acceptance and Recognition Policy (include in-kind donations, address fair market value and disposal of assets)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grants Management System (copies of every proposal, all grants communication, database information, reporting requirements and calendar)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Individual Donor Requirements	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michigan Charitable Solicitation License	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Verification for proper licensing and reporting for contracted professional fundraisers.	MI

Yes	No	In Progress	<b>PRINCIPLES: Governance</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Articles of Incorporation	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Board Calendar (meetings and organizational events)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Board Resolutions/Minutes Book	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bylaws (include board liability and indemnification language)	

Yes	No	In Progress	PRINCIPLES: Governance, continued...	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compensation Documentation (executive and other staff)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Executive Evaluation Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Liability Insurances (Director and Officer, General, Volunteer, etc.)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Risk Evaluation and Management Systems	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Board Member Handbook (policies and procedures including, but not limited to): <ul style="list-style-type: none"> <li>◆ Advocacy and Lobbying</li> <li>◆ Attendance and Dismissal</li> <li>◆ Audit Process and Auditor Selection</li> <li>◆ Communication During Crisis</li> <li>◆ Conflict of Interest</li> <li>◆ Executive Transition (emergency and planned)</li> <li>◆ Committees (purpose, structure, goals and activities)</li> <li>◆ Board Transition (term limits, recruitment, selection)</li> <li>◆ Orientation, Training and Evaluation</li> </ul>	

Yes	No	In Progress	PRINCIPLE: Human Resources	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	403b Plan Documentation	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Benefits Documentation	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compliance with Fair Labor Standards Act	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compliance with Federal ADA and MI Persons with Disabilities Protection Law	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compliance with State and Federal Laws	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employee Health Care Information (kept separately from Personnel Info)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Equal Employment Opportunity (EEO) Policy	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Federal Employee Filings	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Human Resources Records Retention Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michigan/Federal Required Postings (OSHA)	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organizational Chart	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Salary Scales and Compensation Philosophy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Standards and Policies for working with Contractual Employees and Consultants (guidelines for selection, hiring and monitoring)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	State Employee Filings	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Up-to-Date Position Descriptions	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Whistle-Blower Protection Policy	

Yes	No	In Progress	Human Resources Subsection 1. Personnel File – for each employee; including, but not limited to:	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Application with Original Employee Signature	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Background Check	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documentation of Disciplinary Action	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Documentation – Receipt of Employee Policies and Procedures Manual	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Driving Records/Proof of Insurance (as necessary)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form I-9 (required); filed separately from other HR documentation (recommended practice)	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-4	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hire Letter (or contract)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	INS Documentation (Immigration and Naturalization Services: <i>note changes due to Patriot Act and Homeland Security</i> )	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other Conditions for Employment – documentation (drug test results, certifications, etc.)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Performance Appraisals	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Professional Development Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reference Check Documentation	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Resume	

Yes	No	In Progress	Human Resources Subsection 2. Employee Policies and Procedures Manual – including, but not limited to:	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Alcohol/Drug-Free Workplace Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Approved Leave Time – (voting, military service, bereavement)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Attendance/Leave	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Code of Ethics	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Compliance with Equal Employment Opportunity and MI Civil Rights Act	MI/US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confidentiality Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conflict of Interest (including disclosure of relationships)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diversity Plan/Cultural Competency	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eligibility and Classifications	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expense Reimbursement	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grievance	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Intellectual Property Policy	

Yes	No	In Progress	Human Resources Subsection 2. Employee Policies and Procedures Manual – continued...	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Nondiscrimination, Diversity and Harassment Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orientation, Training and Evaluation	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Performance Appraisal Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technology/Equipment Access and Use	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Travel Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Whistle-Blower Protection Policy	

Yes	No	In Progress	PRINCIPLE: Information and Technology	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Collection System (to support continuous improvement and evaluation)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Database, searchable by strategic constituent groups	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disaster Recovery Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Hardware, Software and Vendor Inventory	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Information and Data Sharing Protocol	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	List-serve Protocol	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Management Information Systems (MIS) Policies and Procedures (including Internet, e-mail and security policies)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-site System Back-up	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Security Policies and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Media Protocol	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Software License Compliance	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technology Assessment and Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technology Budget (including maintenance and upgrades)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technology Training Plan (staff and volunteers)	

Yes	No	In Progress	PRINCIPLE: Planning	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advocacy Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Disaster Recovery Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Executive/Leadership Transition Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fund Development Plan (diversification of funds)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marketing and Communications Plan	

Yes	No	In Progress	<b>PRINCIPLE: Planning, continued....</b>	<b>Legal</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mission Statement	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Operational or Business Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organizational Assessment	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Strategic Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainability Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Technology Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vision Statement	

Yes	No	In Progress	<b>PRINCIPLE: Public Policy and Advocacy</b>	<b>Legal</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	501(h) Election	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advocacy Policy/Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Constituent Engagement Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michigan Lobbyist/Lobbyist Agent Financial Report Summary (every six months)	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Michigan Lobbyist/Lobbyist Agent Registration	MI

Yes	No	In Progress	<b>PRINCIPLE: Strategic Alliances</b>	<b>Legal</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accreditation Information (as applicable)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fiscal Sponsorship Policy and Procedures	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Memorandum of Agreement/Understanding or other documentation for each collaborative commitment	

Yes	No	In Progress	<b>PRINCIPLE: Transparency and Accountability</b>	<b>Legal</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Annual Forms and Filings (MI)	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Annual Forms and Filings (US)	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Annual Report (publicly available)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Confidentiality Policies and Procedures (all constituents)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Document Retention and Destruction Policy	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gaming License, Liquor License, other applicable licenses	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 1023 and IRS Determination Letter (publicly available)	US

Yes	No	In Progress	<b>PRINCIPLE: Transparency and Accountability, continued...</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IRS Financial Report or Postcard (Form 990 and variants– publicly available)	US
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MI Charitable Solicitation License	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MI Charitable Trust Registration	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	MI Sales and Excise Tax Exemption	MI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Whistle-Blower Protection Policy	

Yes	No	In Progress	<b>PRINCIPLE: Volunteer Engagement</b>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Budget	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Grievance Policy and Procedure	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organizational Needs Assessment (volunteers)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orientation and Ongoing Training Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Performance Review	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Position Descriptions	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recruitment Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recognition Plan	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Volunteer Policy and Procedures Manual <ul style="list-style-type: none"> <li>◆ Anti-Harassment</li> <li>◆ Attendance</li> <li>◆ Confidentiality</li> <li>◆ Discipline</li> <li>◆ Grievance</li> <li>◆ Liability/Risk Information</li> <li>◆ Non-Discrimination</li> <li>◆ Organizational Chart</li> <li>◆ Travel Policy</li> </ul>	

## Progress Notes

Track the history of your organization's progress here. Make note of strengths and weaknesses; plans and processes to explore and implement; issues to take to Board of Directors. Review regularly to monitor progress and changes.

Date:

Author:

Comments:

Date:

Author:

Comments:

Date:

Author:

Comments:

Date:

Author:

Comments:

## Next Steps

Organization Name: \_\_\_\_\_

Date Checklist Completed: \_\_\_\_\_

Date Updated: \_\_\_\_\_

Completed By: \_\_\_\_\_

Updated By: \_\_\_\_\_

Priority	Item to be Completed	Steps/Activities to Implement	Start Date	End Date	Person Responsible
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					



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