



# Standards for Excellence Institute

## 2025 Standards for Excellence Educational Resource Packets

- **Section 1: Mission Strategy and Evaluation**
  - Mission, Vision, Values and Impact (#1)
  - Planning Strategically Part 1 (#2)
  - Planning Strategically Part 2: Putting Plan into Action with a Community Lens (#3)
  - Organizational Evaluation (#4)
  - Program Evaluation (#5)
  - Strategic Partnerships (#6)
- **Section 2: Leadership**
  - Leadership and Governance Part 1: The Board's Fiduciary Responsibility (#7)
  - Leadership and Governance Part 2: The Board and Executive Partnership (#8)
  - Leadership and Governance Part 3: Board Effectiveness (#9)
  - Leadership and Governance Part 4: Succession Planning (#10)
  - Leadership and Governance Part 5: Board Member Independence (#11)
    - Leadership and Governance Part 6: Board Meetings (#12)
  - Leadership and Operational Management Part 1: Functions of the Executive (#13)
  - Leadership and Operational Management Part 2: Supporting the Board (Creating Mutual Support) (#14)
  - Leadership and Operational Management Part 3: Organizational and Financial Stability (#15)
  - Leadership and Operational Management Part 4a: Managing Employees (#16)
  - Leadership and Operational Management Part 4b: Managing Volunteers (#17)
  - Leadership and Operational Management Part 5: Personnel and Volunteer Policies (#18)
  - Justice, Diversity Equity and Inclusion (#19)
- **Section 3: Ethics and Legal**
  - Ethics (#20)
  - Maintaining Legal Compliance (#21)
  - Required Public Disclosures (#22)
  - Reporting Misconduct and Whistleblower Protection (#23)
  - Conflicts of Interest (#24)
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  - Budgeting, Reporting, and Monitoring Part 1: Preparing the Budget (#25)
  - Budgeting, Reporting, and Monitoring Part 2: Financial Reporting (#26)
  - Budgeting, Reporting, and Monitoring Part 3: Financial Stewardship (#27)
  - Budgeting, Reporting, and Monitoring Part 4: Audits (#28)

- Financial Policies (#29)
- Admin Policies: What are Administrative Policies (#30.1)
- Admin Policies Federal and state required administrative policies (#30.2))
- Admin policies: Crisis and Disaster Management (#30.3)
- Admin Policies; Information Technology (#30.4)
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- Risk Management and Insurance (#31)
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  - Resource Development Plan Part 2: Managing Fundraising Costs (#33)
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  - Fundraising Activities Part 1: Ethics (#35)
  - Fundraising Activities Part 2: Donor Intent (#36)
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  - Acceptance of Gifts (#39)
  - Fundraising on Behalf of Organization Part 1: Working with Fundraisers (#40)
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