

Do you support effective charities? You can. Use *Nonprofit Analytics* from analytics.excellenceingiving.com to assess the number of Performance Standards a charity meets. **Bold Green Titles** below correspond to *Nonprofit Analytics* fields.



/ 6 LEADERSHIP

Nonprofit **CEO** is NOT the **Board Chair**
CEO Annual Evaluation is practiced

Staff Turnover Rate last year is under 25% (if staff exceeds 10)

Board Size is 5+ independent members with 2+ **Annual Meetings**, 2+ **Committees**, and **Term Limits**

NO **Founder or CEO Family Members on the Board** and NO **Board Compensation**

Leadership honestly presents 2 or more **Weaknesses** in the **SWOT Analysis**



Significance?
 Lower % = Higher risk of mission failure

/ 6 FINANCIAL MANAGEMENT

Cumulative **SURPLUS** is greater than cumulative **DEFICIT** for last 4 years

Total Current Debt is less than 30% of annual cash donations

3 or more months of **Current Cash Reserves** are maintained

Reserve Coverage exceeds 50% so assets could be liquidated to fund 50% of a year's operations

Written Financial Controls limit spending and account for all expenses

Performs annual **Independent Financial Audits** (if budgets exceeds \$2 million)

/ 6 LEVERAGE

Program Expenses has higher 3-year growth rate than **Administrative Expenses***

of **Clients Served** has higher 3-year growth rate than **Paid Staff** and **Annual Income***

Cost-per-Client Served decreased in last 3 years: divide **Annual Expenses** by **Clients Served***

Lowers expenses through use of more **Volunteers** than **Paid Staff**

Collaborates with multiple **Strategic Partners**

Cost to Raise \$1 is \$0.15 or less

/ 6 STRATEGY

1-3 Year Plan has specific milestones and deadlines

1-3 Year Plan is realistic based on previous **Results** and **Growth Trends****

Up-to-date Board-approved Strategic Plan guides leadership decisions and organizational direction

Recent Program Improvement is a specific and significant upgrade**

Opportunities in the **SWOT Analysis** are concrete rather than vague or generic**

Geographic Scope of charities with multiple locations is clustered regionally for effective oversight**

/ 6 IMPACT

Measures outcomes against benchmarks or baselines

Completed independent evaluation of program outcomes

Staff tracks **Key Performance Indicators**

Surveys beneficiaries about program quality and impact

Scope of the **Big Organizational Goal** is realistic and measurable**

Results include outcomes that show progress from baselines, not just annual activities and one-time events

/ 6 FINANCIAL SUSTAINABILITY

% of Gift Income from Largest Gift is 15% or less

Annual Income has increased during the last 3 years

Donor Retention Rate exceeds the industry average 55% (or 50% for charities with \$10 million+ income)

of annual **Donors** has increased during the last 3 years

Earned Revenue has grown enough in the past 3 years to increase the **Self-sustainability %**

Board contributes 1% or more of annual income (See **Revenue % from Board**)

Open in **ADOBE Acrobat Reader** to use automated scoring functions.



* This standard only applies to nonprofits with budgets larger than \$500,000 or more than 5 years old.

** Some standards require a judgment call. Nonprofit evaluation is both an art and a science.

<-- Use drop-down "Total" menu to the left to select the number of standards with information to evaluate.