

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 and **Yearly Staff Evaluations** 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**
 Both **Genders** represented but NO **Founder or CEO Family Board Members** and NO **CEO on the Board**
 Leadership honestly presents 2 or more **Weaknesses** in the **SWOT Analysis** that go beyond need for more \$

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 - 6 months of **Cash Reserves on Hand** 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 Services 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 has 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 and Staff **Track Key Performance Indicators**
Completed independent impact evaluation and **Impact Evaluation led to Changed Strategy**
Surveys beneficiaries about program quality and impact or **Completed Randomized Controlled Trial**
 Scope of the **Long-term Vision** is realistic and measurable**
Results include lasting outcomes that show progress from baselines or benchmarks not just annual activity
Results show positive progress against **The Problem** stated in the Strategy section

/ 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 donation income (See **Donation % from Board**)

* 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.

