

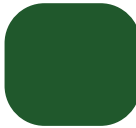
CHARITY SCORECARD for



Do you support effective charities? You can. Use 2020 *Nonprofit Analytics* from analytics.excellenceingiving.com to assess the percentage of our 40 Performance Standards a charity meets. **Bold Green Titles** below correspond to *Nonprofit Analytics* fields.

17 LEADERSHIP

Independence. Nonprofit **CEO** is neither **Board Chair** nor has **Board Vote** Performance Reviews. **Annual CEO** and **Staff Evaluations** are practiced Bottleneck. **CEO Direct Reports** are less than 10 people Turnover. **Staff Turnover Rate** last year is under 25% (if staff exceeds 10) Board Policy. **Board Size** is 5+ independent members with 2+ **Annual Meetings**, 2+ **Committees**, and **Term Limits** Board Composition. **Board Gender** includes men and women with no **Board Members related to the CEO** Integrity. Leadership honestly presents 2 or more **Weaknesses** in the **SWOT Analysis** besides needing more money



Significance?
Lower % = Higher risk of mission failure

17 FINANCIAL MANAGEMENT

Deficits. Cumulative **SURPLUS** is greater than cumulative **DEFICIT** for last 4 years Debt Burden. **Total Current Debt** is less than 30% of annual non-GIK **Total Income** Liquidity. 3-6 months of **Cash & Equivalents on Hand** are maintained Reserves. **Reserve Coverage** exceeds 50% so assets could be liquidated to fund 50% of a year's operations Endowment. **Endowment Fund** is less than 5 times last year's **Program Services + Administrative Expenses** Controls. **Written Financial Controls** limit spending and account for all expenses Audits. Performs annual **Independent Financial Audits** (if budget exceeds \$2 million)

16 LEVERAGE

Overhead. **Program Services Expenses** has higher 3-year growth rate than **Administrative Expenses*** Leverage. # of **Clients Served** has higher 3-year growth rate than **Paid Staff** and **Annual Income*** Economy of Scale. Cost-per-Client Served has decreased in last 3 years: divide **Annual Expenses** by **Clients Served*** Volunteer Ratio. Lowers expenses through use of more **Volunteers** than **Paid Staff** Partnership. Collaborates with multiple **Strategic Partners** Fundraising Efficiency. **Cost to Raise \$1** is \$0.15 or less

17 STRATEGY

Accountability. **1-3 Year Plan** has measurable goals with specific deadlines Feasibility. **1-3 Year Plan** is realistic based on previous **Results** and **Growth Trends**** Strategic Plan. **Up-to-date Board-approved Strategic Plan** guides leadership decisions Organizational Learning. The organization **Cut (or Modified) a Program in the last 3 years for bad results** Program Improvements. **Recent Program Improvement** is a specific and significant upgrade** Growth Opportunity. **Opportunities** in the **SWOT Analysis** are concrete rather than vague or generic** Locations. **Geography** of multiple locations is clustered regionally for effective oversight**

17 IMPACT

Dosage. **Length of Primary Client Relationships** is enough time to solve **The Problem**** Benchmarking. **Measures outcomes against benchmarks** with 1+ benchmark cited in **Results** section Evaluation. **Completed independent impact evaluation** of program outcomes KPIs. Staff tracks **Key Performance Indicators** on internal scorecard Beneficiary Voice. **Surveys beneficiaries** about program quality and impact Big Picture. Scope of the **Long-term Vision** is realistic and measurable** Outcomes. **Results** include lasting improvement from baselines, not just annual activities and one-time events

16 FINANCIAL SUSTAINABILITY

Donor Concentration. **Reliance on Largest Gift** is 15% or less of **Total Income** Income Growth. **Annual Income** has increased during the last 3 years Retention. **Donor Retention Rate** exceeds the industry average of 47% for \$10+ million charities and 55% for the rest Acquisition. # of annual **Donors** has increased during the last 3 years Self-Sustainability. **Earned Revenue** has grown enough in the past 3 years to increase the **Self-sustainability %** Board Contributions. **Donation % from Board** is 1% or more of annual **Cash Donations**

* 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.

