



Nonprofit Analytics

GENERAL												
Organization Name				U.S. Tax ID#			Year Founded					
HQ Street Address				City & State			Zip					
Phone		HQ Nation		Website(s)								
Primary Contact & Title				Contact Email								
Organization Type				Annual Report Link								
Nonprofit Accountability Listings	BBB (give.org) Guidestar ECFA		Charity Navigator Charity Watch Ministry Watch		Strategic Partners							
Primary Program Area				Peer Group								
Other Program Area(s)				Clients Served								
GROWTH TRENDS												
	FY 2015	FY 2016	FY 2017	FY 2018	% Change	Explanation						
Paid Staff (FTE)					%							
Clients Served					%							
Annual Income					%							
Donors					%							
Key Activity					%							
FUNDRAISING												
Donor Retention Rate		Gov't Funding %		Cost to Raise \$1 <small>(NOT "GIVE")</small>			Self-sustainability %					
Largest Gift for FY		Gift Income % from Largest Gift			Invested Endowment Fund Balance							
Donors Listed by Gift Size for FY	Gift Size:	< \$1,000	\$1K - 4,999	\$5K - 24,999	\$25K - 49,999	\$50K - 99,999	\$100,000 +					
	# of Donors:											
	Total Amount:											
FINANCIAL MANAGEMENT												
Cash & Equivalents on Hand		Near-term Expendable Net Assets			Total Current Debt							
Written Financial Controls		Yes	No	Independent Financial Audits			Yes	No	Reserve Coverage %			
FISCAL YEAR TO		FY 2015		FY 2016		FY 2017		FY 2018		2019	BUDGET ACTUALS	2015-2018 FY TRENDS
INCOME	Earned Revenue											%
	Gifts in Kind											%
	Cash Donations											%
	<i>Total Income</i>											%
EXPENSES	Program Services		%		%		%		%		%	%
	Administrative		%		%		%		%		%	%
	Fundraising		%		%		%		%		%	%
	<i>Total Expenses</i>											%
SURPLUS/DEFICIT												

LEADERSHIP

CEO Name & Tenure					CEO Age			
CEO Annual Evaluation	Yes	No	CEO has Board Vote	Yes	No	CEO Successor Identified	Yes	No
Total Paid Staff by Type	FT:	PT:	Staff Turnover Rate			Total Volunteers		
Yearly Staff Evaluations	Yes	No	CEO Direct Reports			Annual Board Meetings		
Board Chair & Tenure					Board Size			Board Gender Diversity
Donation % from Board			Board Committees			Term Length		
Additional Advisory or Development Board	Yes		No		Number of Board Members Related to the CEO			

STRATEGY

MISSION									
CLIENTS SERVED							LENGTH of Primary Client Relationships		
The PROBLEM									
Your SOLUTION									
1-3 year PLAN									
Up-to-date Board-approved STRATEGIC PLAN	Yes	No	CUT (or Modified) PROGRAM in last 3 years for bad results	Yes	No				

IMPACT

Long-term VISION								
RESULTS Report outcomes <i>not</i> activities								
Measure outcomes against benchmarks	Yes	No	Track Key Performance Indicators	Yes	No	Completed independent impact evaluation	Yes	No
Completed program logic model(s)	Yes	No	Survey program beneficiaries	Yes	No	Conducted randomized controlled trial (RCT)	Yes	No
Impact STORY								
Recent Program IMPROVEMENT								

GEOGRAPHIC SCOPE

Where do your programs operate?	Local	Regional	National (USA)	International (List nations or regions served below alphabetically)

S.W.O.T. ANALYSIS

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS

SOURCE	Completed By:		Date:	
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