

Charity Evaluation

Name of Organization and Project: _____

Contact:

Address:

E-mail:

Web address:

Phone:

Date project to start:

Amount requested:

How well does the "ask" align with my interests	Rating	Notes
Values and culture match:	(1) (2) (3) (4) (5)	
Mission match:	(1) (2) (3) (4) (5)	
Is their Mandate clearly articulated:	(1) (2) (3) (4) (5)	
Program effectiveness:	(1) (2) (3) (4) (5)	
Realistic project implementation plan:	(1) (2) (3) (4) (5)	
Level of innovation:	(1) (2) (3) (4) (5)	
Ability to scale:	(1) (2) (3) (4) (5)	
Project budget matches implementation plan:	(1) (2) (3) (4) (5)	
Other:	(1) (2) (3) (4) (5)	
Leadership and Community Engagement	Rating	Notes
Strength of their Leadership (ED and/or board chair):	(1) (2) (3) (4) (5)	
What is the size of their Board:	# =	
Staff (#):	# =	
Volunteer (#):	# =	
Geographic location of program:	=	
Geographic reach of organization:	=	
Strength of Track-record on the issue:	(1) (2) (3) (4) (5)	
Well documented financial policies and procedures:	(1) (2) (3) (4) (5)	
Up to date strategic plan:	(1) (2) (3) (4) (5)	
Strength of Donor Stewardship plan:	(1) (2) (3) (4) (5)	
KPIs and Applicable and Attainable:	(1) (2) (3) (4) (5)	

Do they have a self-reporting mechanism:	(1) (2) (3) (4) (5)	
Do they understand the landscape in which they operate (who else is offering similar services):	(1) (2) (3) (4) (5)	
What is their willingness to collaborate with others:	(1) (2) (3) (4) (5)	
Are they Accessible and Transparent:	(1) (2) (3) (4) (5)	
Other:		
Other Assessment Areas	Rating	Notes or Next Steps
Are the outcomes properly described:	(1) (2) (3) (4) (5)	
Accountability standards:	(1) (2) (3) (4) (5)	
Financial reporting clear (audited financial statements or annual statements):	(1) (2) (3) (4) (5)	
Strength of Balance sheet:	(1) (2) (3) (4) (5)	
Financial need:	(1) (2) (3) (4) (5)	
Strength of Fundraising process:	(1) (2) (3) (4) (5)	
Other:		

Additional to Answer:

What are the top three risks facing this organization?

Who are the other funders supporting this project?

Is there anyone else better suited for this project?

Final Thoughts: