

# Charity Evaluation Notes Worksheet Template

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## 1. The charity has room for more funding and concrete plans for growth.

From IRS Forms 990 or equivalent, if available:

	2013	2014	2015	2016
Income				
Expenditures				
Assets				
Assets/Expenditures				

1. Have the charity's revenue and expenditures been increasing in recent years?
  - a. Have they been increasing at the same rate or separately? Are differences suggestive?
  
2. Record charity's assets and expenditures for the last 2-5 years.
  - a. Has the ratio of assets to expenditures grown? Is it unusually high or low? If it is high or low, is this easy to explain based on the charity's activities?

From Website:

1. Does the charity have explicit plans for what they would do with more funding?

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## **2. The charity engages in programs that seem likely to be highly impactful.**

### **From Website:**

1. What interventions does the charity perform?
2. What outcomes does the charity expect their programs to have?

### **From Outside Sources:**

1. What outcomes would we expect those interventions to have? (See the list of interventions and outcomes.)
2. Is the charity working on interventions that ACE or other experts believe to be specifically high impact?

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## **3. The charity operates cost-effectively, according to our best estimates.**

*It is unlikely any cost effectiveness calculation will be useful at this stage.*

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## **4. The charity possesses a strong track record of success.**

### **From Website:**

1. Do claims of success on the website refer to statistics, large-scale evidence, or far-reaching victories? Or are they anecdotal?
2. Are claims on the website documented if appropriate?

**From Outside Sources:**

1. If the charity makes claims of influencing public events, do web searches for other information about those events also attribute causality to the charity?
  2. Are claims on the website reasonable by comparison to other similar programs, or are they obviously overstated?
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## **5. The charity identifies areas of success and failure and responds appropriately.**

**From Website:**

1. Does the charity have explicit plans and goals for its activities?
    - a. Does the charity have goals that are SMART: specific, measurable, achievable, relevant, and time-bound?
  2. Does the charity have a record of changing key aspects of its programming based on an evolving understanding of what works to achieve its goals?
  3. Does the charity have a record of self assessment or of engagement with others for assessment?
    - a. Are the metrics used in these assessments appropriate?
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## **6. The charity has strong leadership and a well-developed strategic vision.**

**From Website:**

1. What is the organization's mission?
2. To the best of our knowledge, is the organization working in a neglected or unique area, or to provide resources that are valuable to the animal advocacy movement as a whole? How so?
3. Is the organization engaged in collaborations with other advocates or advocacy groups?

4. If board members are listed on the website, provide a list of board members and brief descriptions of their occupations or backgrounds (job titles/industries or links to LinkedIn are sufficient).
5. Does the organization have a strategic plan available from their website?
6. Record any overall impressions of the leadership and structure of the charity. Cite specific sources if possible.

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## **7. The charity has a healthy culture and a sustainable structure.**

### **From IRS Forms 990 or equivalent, if available:**

1. What sources of revenue (e.g. grants, donations, ticket sales) did the charity have last year, and what proportion of funding did each account for?

### **From Website:**

1. Is there evidence of opportunities for staff to develop and grow while working with the charity?
2. Is there a written statement that defines “diversity” for the organization that everyone agrees on? (Shared vision that conveys the importance of diversity and inclusion to the charity)
3. Does the charity have staff from diverse backgrounds (e.g. occupation, education, religion) and with diverse personal characteristics (e.g. race, gender, age)?
  - a. Is the leadership of the charity diverse in similar ways to the staff overall?
4. Has the charity survived leadership transitions in the past?