



Nonprofit Evaluation Checklist

1. Mission & Impact

- ☐ Clear and compelling mission statement
- ☐ Programs align with mission
- ☐ Evidence of measurable impact
- ☐ Community meaningfully served

Notes:

2. Leadership & Governance

- ☐ Active, engaged, and diverse board
- ☐ Experienced leadership team
- ☐ Succession plans in place
- ☐ Transparent governance practices

Notes:

3. Financial Health

- ☐ Audited financials available
- ☐ Diversified revenue sources
- ☐ Appropriate financial reserves
- ☐ Responsible expense allocation
- ☐ Annual report published

Notes:



KEEN WEALTH ADVISORS

4. Transparency & Accountability

- ☐ IRS registration and good standing
- ☐ Accessible, up-to-date Form 990s
- ☐ Clear communication of goals & challenges
- ☐ Regular outcome reporting

Notes:

5. Programs & Efficiency

- ☐ Programs show evidence of effectiveness
- ☐ Strong % of expenses to programs
- ☐ Regular program evaluation
- ☐ Equitable and inclusive service delivery

Notes:

6. Reputation & Partnerships

- ☐ Positive community and partner reputation
- ☐ Collaborates effectively (avoids duplication)
- ☐ Recognized by credible watchdogs

Notes:

7. Personal Alignment

- ☐ Aligns with personal/family values
- ☐ Confidence in sharing support
- ☐ Opportunities for deeper involvement

Notes:
