Charity Intelligence Canada

Results Reporting Guide 2019

V6.8: with Ski Trails

September 2019

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Scoring Rubric Overview

Charity Intelligence (Ci) uses a dual scoring rubric to avoid scoring all output and outcome data equally, regardless of a program's significance to your charity's overall work. For overarching questions about your charity's operations, Ci uses the one-column scoring rubric. For questions that look for information that can be reported separately for different programs, Ci uses the three-column rubric. If you are a one-program charity, your Results Reporting score will be scored primarily with the one-column rubric.

Consider this case: a charity provides detailed output and outcome data for a program that receives 5% of total program spending. For the remaining programs (which receive 95% of the charity's resources), there is no data reported. If Ci treated all output and outcome data equally, the charity might score quite high. Ci developed the three-column rubric to properly acknowledge charities that report well across all (or most) programs.

The Three-Column Rubric:

For program-specific reporting

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

The One-Column Rubric:

For overarching charity reporting

	All
Ideal	10
Good	7
Something	3
Nothing	0

Results Reporting Framework

Your charity's Results Reporting Grade is determined by 26 'Keystone' questions, which can be divided into six sections.

Section	**No. of Questions**	**Components**
Strategy	4	Mission | Strategic Plan Problem Statement | Problem Quantification
Activities	2	Program Structure | Program Spending
Outputs (by program)	7	Quantified Outputs | Quantified Beneficiaries Data Trends | Data Comparability | Data Timeliness Quantified Output Goals | Data Accuracy
Outcomes (by program)	8	Mention of Outcomes | Quantified Outcomes Data Trends | Data Comparability | Data Timeliness Outcome Longevity | Quantified Outcome Goals Data Accuracy
Quality	3	Reliability | Clarity | Balance
Learning	2	Program-related Learning | Informed Program Changes

Four of the Keystone 26 Questions use the one-column rubric. The remaining 22 use the three-column rubric.

One-column rubric:

SECTION	QUESTIONS
Strategy	Q1: Mission
Activities	Q5: Program Structure Q6: Program Spending
Quality	Q23: Clarity

Three-column rubric:

SECTION	QUESTIONS
Strategy	Q2: Strategic Plan Q3: Problem Discussion Q4: Problem Quantification
Outputs	All questions
Outcomes	All questions
Quality	Q22: Reliability Q24: Balance
Learning	All questions

Results Reporting Glossary

Activities: The actions, work, processes, tools, and events in which a charity engages to produce outputs. Activities mobilize inputs including funds, volunteer work, donated goods and other resources in order to implement a program.

Beneficiary: The individuals, groups or organizations that benefit from a charity's programs and activities.

Indicator: A quantitative or qualitative variable measured in order to track outputs and outcomes, and to evaluate achievement, performance, changes, and consequences of the charity's work.

Input: Any resource, including funds, volunteer hours, donated goods, pro-bono services, etc., that an organization mobilizes to generate outputs.

Outcome: The consequences and cumulative effects of a charity's outputs over time on the beneficiaries, communities, and causes the charity serves.

Output: The quantifiable services and products produced as an immediate and direct result of a charity's activities. Output measures can cover a diverse range of information about a charity, including numbers of beneficiaries, partners and stakeholders, demographic information and more. Ci breaks out a subsection of these measurements we call "Level of Service" related to the scope and quantity of the services provided. Level of Service may focus on how much, how many, and/or how often a service is delivered.

Problem: The specific condition that a charity seeks to change or alleviate.

Program: A set of deliberate, planned activities, specifically managed, with a unified focus and goal.

Reporting: The information that a charity makes publicly available, regarding its activities, finances and performance. This information is typically presented on an organization's website and in its annual report. (See CICA, Improved Annual Reporting by Not-For-Profit Organizations).

Theory of Change: A clear explanation of how a charity expects to achieve its mission and vision through its strategic intervention, taking into account the nature of the problem, degree of need, causes, context, and beneficiaries.

The Ski Trails Map

Ci's Difficulty Rating:

EASY

INTERMEDIATE

EXPERT

Ci introduced Ski Trails after noticing a common theme in the types of responses we received from charities related to the Results Reporting grade. Although charities wanted to improve their scores, they did not know where to start. The technical Results Reporting Scoring Guide that Ci analysts use is long, wordy, and confusing to first-time readers.

Ci analyzed the Keystone 26 Questions and identified which questions were 'easy' versus 'hard' to answer for charities to earn full points. Ci believes that by categorizing the Keystone 26 Questions by level of difficulty, charities will have a more concrete handle on where to pick up points without barreling headfirst into the most difficult questions.

Ci divided the questions into three categories (and one bonus question) based on how ski runs are classified by difficulty.

Ci's advice for charities looking to improve in Results Reporting: start with the Easy questions! Once you maximize your points in this category, tackle the Intermediate ones. After you've covered those, turn your focus to Expert questions. Because Results Reporting can be a new concept, Ci likens tackling the three categories to how you'd learn to ski - you don't skip your green and blue runs and go straight to black diamonds!

The Keystone 26 Questions: Ski Map

	Question		Easier	Intermediate	Advanced	
Strategy	1	Mission statement	●			
	2	Charity model		■		
0%	3	Problem discussion	●			
	4	Quantification of problem		■		
Activities	5	Overview of programs	●			
0%	**6**	**Allocation of resources by program**	●			
Outputs	**7**	**Quantified service level**	●			
	8	**Beneficiaries by program**	●			
0%	9	Outputs compared with previous years	●			
	10	Outputs comparable with other charities			◆	
	11	Output timeliness - dated and recent	●			
	12	Output goals	●			
	13	Output definitions and calculations		■		
Outcomes	14	Outcomes mentioned	●			
	15	**Outcomes quantified**			◆	
0%	16	Outcomes compared with previous years			◆	
	17	Outcomes comparable with other charities			◆	
	18	Outcome timeliness - dated and recent			◆	
	19	Outcome timing post completion			◆	
	20	Outcome goals		■		
	21	Outcome definitions and calculations			◆	
Quality	22	Report assured			◆◆	
0%	23	Report clearly presented		■		
	24	Balance		■		
Learning	25	Learning		■		
0%	26	Change due to learning		■		
	TOTAL					0

4: Notes from Katie

The six sections are not independent – scores in one section can affect scores in other sections.

Activities

The Activities section is what I consider the apex of your charity's Results Reporting Grade. Your charity's performance in this section (typically) affects your scores in all other sections. The purpose of this section is to figure out your charity's program structure and assign relative weightings to your programs based on money spent. These weightings determine whether your charity falls into the Minority, Majority, or All column for program-specific questions scored using the three-column rubric.

Q5: identifies your charity's core programs – I like to call them 'program buckets.' Consistency, clarity, and simplicity are crucial. Your program structure should be reported consistently across your website and publications (annual reports, strategic plans, etc.)

Q6: looks at how your charity allocated its mission spending to each core program in the most recent fiscal year. For full points, you should break down total spending by your core programs, and the breakdown should align with how you present your program structure. Reporting a lump sum for multiple programs earns a low score. When there is insufficient (or no) breakdown, Ci analysts assume all your programs receive an equal amount of spending.

Why is this important? Donors looking at your website should be able to easily identify the programs on which your charity spends most of its money. This information also helps Ci analysts identify which programs to focus on when completing your Results Reporting evaluation. Rarely do charities with 10+ programs allocate funds equally to each. More often, there is a dominant program that receives over 50% of program spending, and two or more Minority programs that each receive under 50%. Data reported on larger programs earns more points than data reported on smaller programs.

Notes from Katie

Outputs

The critical questions

Q7: looks for quantified outputs for each core program.

Q8: looks for the number of clients served by each core program, and the total number of clients your charity served over the year with relevant demographic breakdown(s).

The main idea

Your scores in Q7 and Q8 set limits on the maximum scores you can receive in all but one (Q12) of the remaining five Outputs questions. Why? The columns your charity scores in for these two questions (Minority, Majority, or All) influence the columns you may score in for the remaining Outputs questions.

There may be column movement to the left, but not to the right of the 'boundary' set by your scores in Q7 and Q8. The data found in these two questions is what Ci bases the remaining output scores on.

What this means: if you are in the Majority column in Q7 and Q8, you cannot score in the All column within the remaining outputs questions (except Q12).

Important note

Clearly assigning your output and client data to corresponding programs makes it easy for donors (and Ci analysts) to understand what each of your programs accomplished during the year. If you state outputs and client numbers generally (to encompass all programs), it does not mean your charity will score in the All column in Q7 and Q8 (this does not apply to one-program charities). If your charity has multiple programs but key outputs are not reported for each program separately, Ci analysts score your charity in the Minority column.

“Notes from Katie

Outcomes

The critical question:
This section is similar to Outputs. Q15 is the most important question. It looks for quantified outcomes for each major program. The column your charity scores in for Q15 sets the rightmost 'boundary' for all but one (Q20) of the remaining Outcomes questions.

Important note: Outputs versus Outcomes
Outcomes and outputs often get confused. Outputs quantify what your charity did during the year as a result of running its programs. Outputs can be measured immediately; think of things like the number of support sessions held, research grants distributed, active development projects or disaster responses made during the year.

Outcomes quantify the (positive) change resulting from your outputs. They are long-term consequences of the work your charity does. I view outcomes as quantified measures of change: how program outputs have added value to the community, improved the lives of those served, or otherwise improved the status of the problem your charity hopes to solve or eliminate.

Consider this case: XYZ charity has a program that provides job training. This program's key output could be the number of training sessions held, broken down by training type. Its client count would be the number of unique people who attended the sessions. Example: "This past year, XYZ charity ran 25 sessions in total. This included 15 for computer training and 10 for interview preparation. 150 people attended computer training sessions (50 unique clients) and 70 people attended interview workshops (30 unique clients)."

An outcome for this program could be the number of people who went on to secure jobs after attending XYZ's training sessions. Example: "Using the information learned by attending our training sessions, 12 of XYZ clients secured full-time jobs during the year."

Notes from Katie

Quality

Disclaimer: Q22 is a bonus question – it is where your charity can earn points if you hired a third party to externally evaluate your programs. Because this is often expensive, we do not expect charities to do this. Accreditation by Imagine Canada earns some points!

Q23 evaluates the amount of information available for your charity's programs and how easy this information is to find. If Ci analysts have to scour a website and read multiple reports to get a complete picture of your charity's work and results, this is not ideal. A donor should be able to go to your website and easily learn about major programs, outputs, outcomes, and program-related learning.

Q24 looks for well-rounded reporting on program activities. In addition to what went well during the year, we want to see data on what did not go well, what did not work, or which targets were not met. Quantified data on setbacks or failures to achieve goals earn points.

Learning

This section focuses on whether your charity tracks its program performance, analyzes and studies the data, and makes smart program changes based on what was learned. Programs that stay the same over time lose effectiveness as the surrounding world changes. We want to see that your charity adapts, creates, and/or modifies its programs according to what does and does not work.

5: The Keystone 26 Questions

Section 1: Strategy

Q1. Mission: Does your charity have an easy-to-find, labelled statement describing what it does and why it does it?

Q2. Strategic plan: Does your charity discuss its strategy and explain how its programs work towards the mission?

Q3. Problem statement: Does your charity provide a detailed discussion of the problem(s) that each of its programs target?

Q4. Problem quantification: Does your charity quantify the problem(s) that it targets in terms of prevalence, scope, and/or magnitude?

Section 2: Activities

Q5. Program structure: Does your charity clearly outline its program structure?

Q6. Program spending: Does your charity clearly state how much it spends on its programs?

Section 3: Outputs

Q7. Quantified outputs: Does your charity quantify its program activity levels?

Q8. Quantified beneficiaries: Does your charity report the number of clients it helps through its programs?

Q9. Data trends: Does your charity report output and/or beneficiary data from previous years?

Q10. Data comparability: Are your charity's output metrics reasonable for similar charities to report, allowing for comparison?

Q11. Data timeliness: Are your charity's outputs clearly dated and current?

Q12. Quantified output goals: Does your charity describe quantified and dated output goals for its programs?

Q13. Data accuracy: Does your charity report outputs precisely and provide definitions and/or calculations when appropriate?

Section 4: Outcomes

Q14. Mention of outcomes: Does your charity comment on outcomes for its programs?

Q15. Quantified outcomes: Does your charity report quantified outcomes for its programs?

Q16. Data trends: Does your charity report quantified outcomes from previous years?

Q17. Data comparability: Are your charity's outcome metrics reasonable for similar charities report, allowing for comparison?

Q18. Data timeliness: Are your charity's outcomes clearly dated and current?

Q19. Outcome longevity: Does your charity wait to assess its outcomes to measure its long-term effects?

Q20. Quantified outcome goals: Does your charity describe dated and quantified outcome goals for its programs?

Q21. Data accuracy: Does your charity report outcomes precisely and provide definitions and/or calculations when appropriate?

Section 5: Quality

Q22. Reliability: Have your charity's program results been reviewed by a third party?

Q23. Clarity: Does your charity provide output and outcome data for most programs? Is this information easy to find?

Q24. Balance: Does your charity present a holistic view of its activities, including both positive and negative performance?

Section 6: Learning

Q25. Program-related learning: Does your charity describe program-related learning made within the last two years?

Q26. Informed program changes: Does your charity make program changes based on what it has learned?

Section 1: Strategy

Q1. Mission: Does your charity have an easy-to-find, labelled statement describing what it does and why it does it?

Ci's Difficulty Rating: EASY

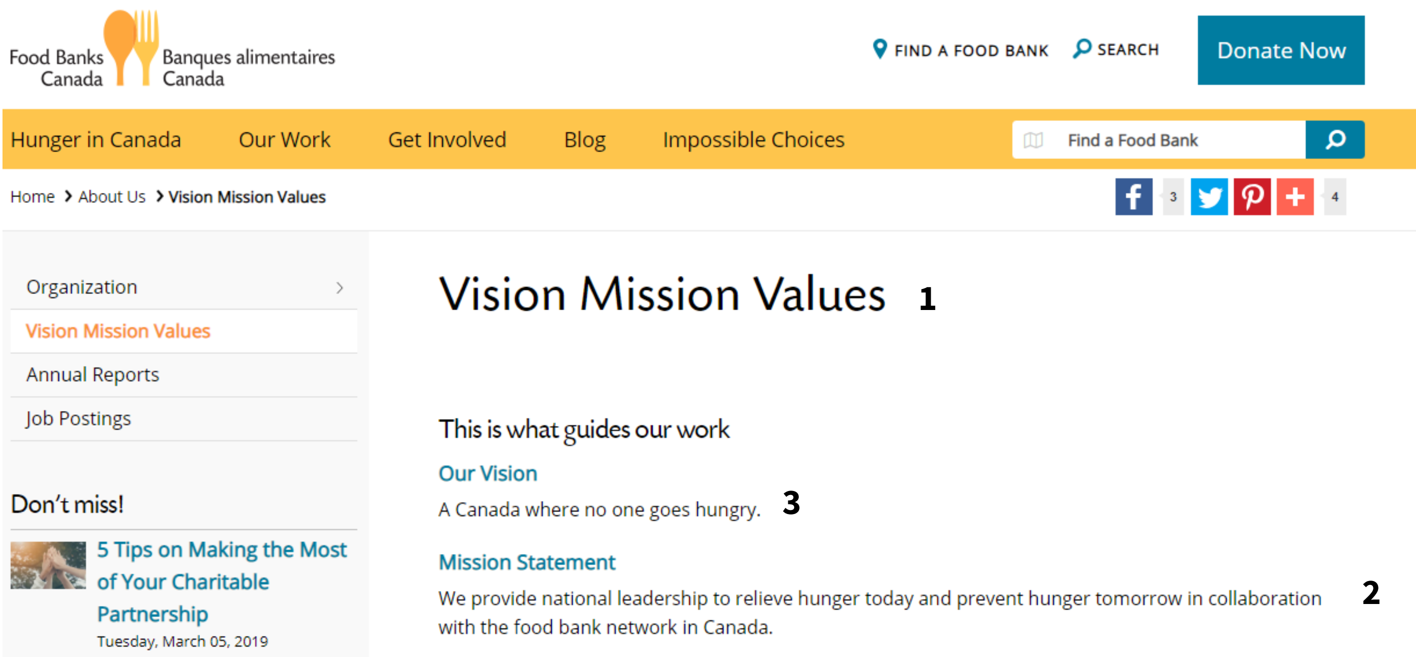
Purpose: A clear, easy-to-find section describing what your charity does and why helps donors understand your work, goals, and outcomes.

- **Ideal**: There is a clearly labelled, easy-to-find section where your charity states what it does and why it does it. This is often labelled as a 'Mission' and 'Vision.'
- **Good**: There is a clearly labelled, easy-to-find section where your charity states what it does or why it does it, but not both.
- **Something**: There is no labelled section, but there is a statement somewhere obvious on your charity's website describing what it does and why it does it.
- **Nothing**: No statement describing what your charity does or why it does it.

	For your whole charity
Ideal	10
Good	7
Something	3
Nothing	0

Section 1: Strategy

Ideal example: Food Banks Canada



CRITERIA FOR IDEAL	MET?
Clearly labelled	✔ (1)
The 'what'	✔ (2)
The 'why'	✔ (3)

Section 1: Strategy

Q2. Strategic plan: Does your charity have a clearly labelled discussion that explains how each of its programs relates to its mission?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Donors want to understand why your charity runs its programs, and they can learn this when you describe how each program works toward the overall mission. Common strategy labels include: strategic plan, strategic direction, logic framework, logic model, or theory of change.

- **Ideal**: Your charity has a clearly labelled discussion or figure that provides a detailed explanation of how each program operates to work toward the mission.
- **Good**: Your charity has a clearly labelled discussion or figure that briefly explains how each program operates to work toward the mission.
- **Something**: Your charity has an unlabelled discussion that connects its programs to the mission.
- **Nothing**: No discussion can be found for your charity's program strategy.

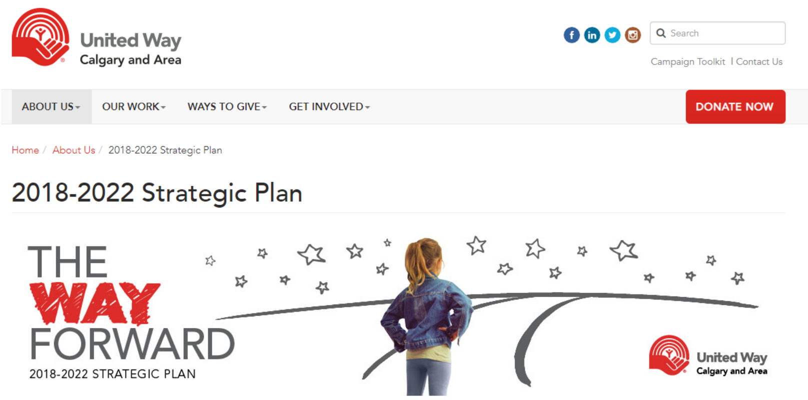
	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 1: Strategy

Ideal example: United Way Calgary

United Way Calgary has a 2018-2022 Strategic Plan posted on its website.

1



3 For each of its core programs (Overcoming Poverty, Successful Kids, and Strong Communities), it explains what it does and describes the key outcomes that relate to the mission:

The report includes its mission and vision: 2

CRITERIA FOR IDEAL	MET?
Clearly labelled	✔ (1)
Mention of mission + programs	✔ (2)
How mission is achieved	✔ (3)
Detailed	✔

Section 1: Strategy

Q3. Problem statement: Does your charity describe the problem(s) its programs target?

Ci's Difficulty Rating: EASY

Purpose: Donors often give to charities that target problems they hold close to heart. Because of this, it is important for your charity to identify and explain the key issue(s) that it addresses through its programs.

- **Ideal**: Your charity has a detailed discussion in one place that describes the problem(s) it targets. The discussion analyzes causes, consequences, and who is affected.
- **Good**: Your charity has a short discussion about the problem(s) it targets. The discussion mentions causes, consequences, or who is affected.
- **Something**: Your charity briefly mentions the problem(s) it targets, but the information is not comprehensive.
- **Nothing**: Your charity does not mention the problem(s) it targets.

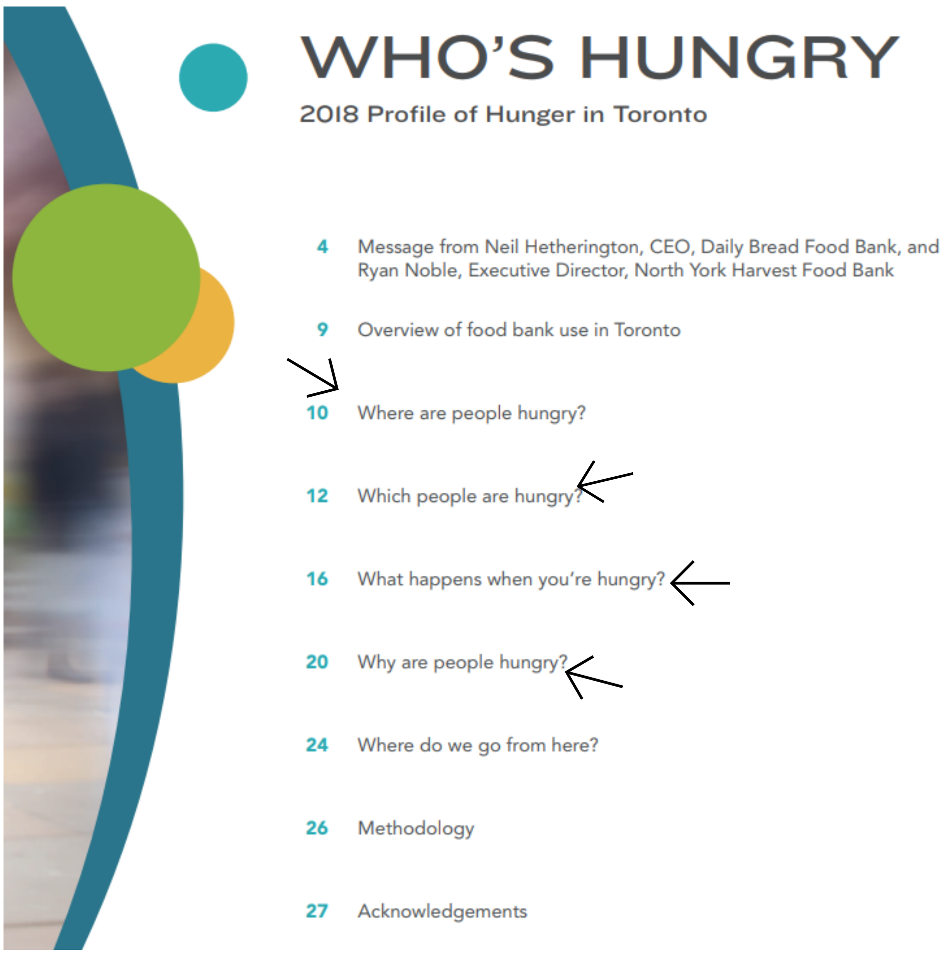
	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 1: Strategy

Ideal example: Daily Bread Food Bank

Visit Daily Bread Food Bank's website (www.dailybread.ca) to view the full 2018 *Who's Hungry* report, which offers a detailed analysis of the current state of hunger in Toronto.

Table of Contents for the report:



WHO'S HUNGRY

2018 Profile of Hunger in Toronto

CRITERIA FOR IDEAL	MET?
Detailed	✔
Causes, consequences, people affected	✔ (see arrows)
All in one place	✔

Section 1: Strategy

Q4. Problem quantification: Does your charity quantify the problem(s) it targets?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Problem quantification helps donors scope the problem – is it urgent? Is there a need? Donors can use quantified data to judge the scale of the problem your charity seeks to solve so they can make informed giving decisions.

- **Ideal**: Your charity provides absolute numbers quantifying the prevalence, scope, and/or magnitude of the problem. It quantifies multiple aspects of the problem and includes some relevant breakdown (subcategories, subgroups of those affected, etc).
- **Good**: Your charity provides problem quantification on one dimension with some breakdown.
- **Something**: Your charity does one of the following: provides summary statistics on the problem; quantifies the level of demand for your charity's services; or quantifies the problem using your own client data.
- **Nothing**: No numerical data found that quantifies the problem(s) your charity targets.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 1: Strategy

Ideal example: United Way Halton & Hamilton

United Way Halton & Hamilton has three core granting programs. For each, there is a Backgrounder report similar to the one presented below:

United Way Halton & Hamilton / 2017 CAMPAIGN

From Poverty To Possibility

There's an issue

For too many Canadians across the country, poverty is a daily—and difficult—struggle. It forces people and families to make impossible choices like whether to put food on the table or to pay the rent. It touches every aspect of a person's life, making it difficult to get ahead and realize a future full of possibility.

1 in 10 Canadians live in poverty.

1 35,000 Canadians are homeless on any given night.

1 in 6 children live in a household that struggles to put food on the table.

There's a way forward

With your support, United Way is helping to meet the basic needs of our community's most vulnerable people and families, giving every Canadian the opportunity to build a better future. This includes providing the essential building blocks of a good life such as food, shelter and employment, while also helping to ensure fewer people are vulnerable in the first place.

$5 provides one meal to someone who is homeless, giving them refuge in a safe environment.

$50 provides a frost prevention kit for two homeless people, including a scarf, toque, gloves and pocket warmers.

$250 provides a healthy lunch for a parent and child for five weeks.

$600 covers a resumé writing workshop for women living in poverty.

$1,200 provides important household items to six families, helping them make a life-changing move to secure housing.

But, there are barriers

Poverty isn't just about a paycheque. In fact, it touches almost every aspect of a person's life from food, shelter and employment to mental and physical well-being. It's a social and economic issue that also impacts entire communities—and the people who live there.

$7 billion: the cost of homelessness to the Canadian economy each year.

12.4%: the unemployment rate for Indigenous peoples across Canada, compared to just 6.9% for the non-Indigenous population.

14.7% of Canadians under 18 were living in a low-income household in 2014.

2

That's why your help matters

Your gift to United Way helps give every Canadian the opportunity to build a better future by providing the foundational building blocks of a good life.

$63M+ is invested in supporting people living in poverty by providing opportunities they need to build a better life.

1,000+ programs and services are funded, including access to food, emergency shelters and employment counselling.

1.3M+ people are served across Canada, helping increase their economic security and overall well-being.

3

CRITERIA FOR IDEAL	MET?
Prevalence, with subcategories	✔ (1)
Multiple aspects of problem barriers	✔ (2)
Additional quantification using own data	✔ (3)

Section 2: Activities

Q5. Program structure: Does your charity clearly outline its programs?

Ci's Difficulty Rating: EASY

Purpose: Donors want to understand your charity's activities. If you focus your communications on programs that represent only a fraction of total activities, donors do not get the whole picture of your charity's results and what their donations are funding in the community.

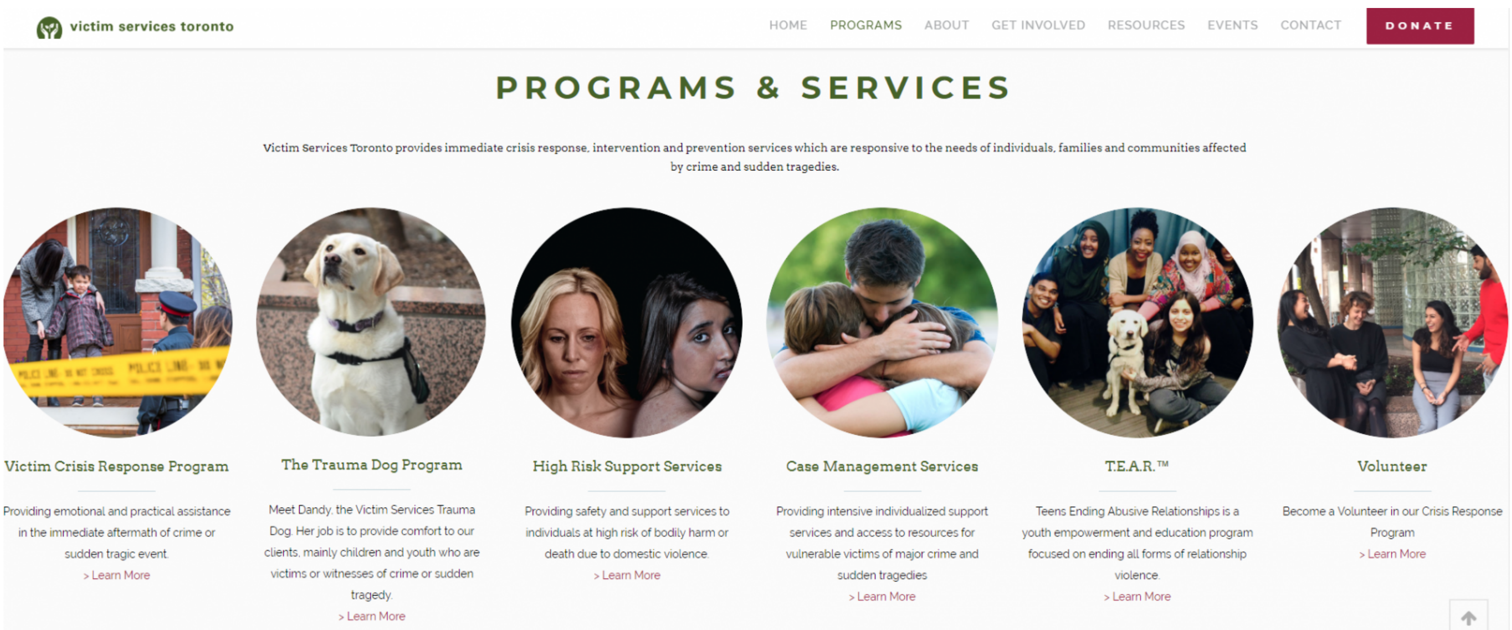
- **Ideal**: A labelled and clear overview of your charity's programs, consistently presented across its website/publications (annual report, newsletters, etc.).
- **Good**: A labelled and clear overview of your charity's programs is provided, but there is some inconsistency across the website/publications.
- **Something**: Your charity describes its programs generally.
- **Nothing**: Your charity does not talk explicitly about its programs.

	For your whole charity
Ideal	10
Good	7
Something	3
Nothing	0

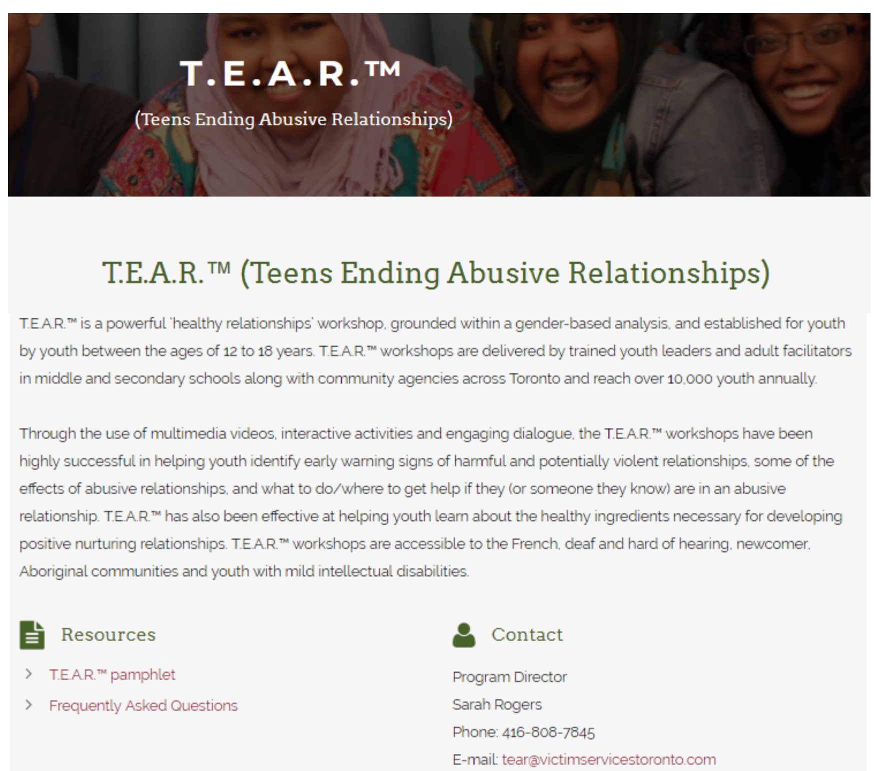
Section 2: Activities

Ideal example: Victim Services Toronto

VST has a Programs landing page with summarized descriptions of its five core programs (volunteer work falls under Crisis Response work). Under *each* summary, a 'Learn More' link takes you to individual program web pages that provide detailed program descriptions.



CRITERIA FOR IDEAL	MET?
Labeled, clear overview	✔
Consistent presentation	✔



Section 2: Activities

Q6. Program spending: Does your charity clearly state how much it spends on its programs?

Ci's Difficulty Rating: EASY

Purpose: This question numerically assesses the relative size of each of your charity's programs. Using your program spending breakdown, Ci assigns weightings to all programs. This is what Ci analysts use to place your charity in the Minority, Majority, or All column for questions scored using the three-column rubric.

- **Ideal**: Your charity reports how much it spent on each of its core programs somewhere on your website (i.e. not just in the audited financials). For single-program charities, a 'breakdown' of program spending is not required.
- **Good**: Your charity has a detailed program spending breakdown, but it is only found in the audited financials, OR your charity provides a program spending breakdown that includes clumped costs for multiple programs (i.e. further breakdown would be useful).
- **Something**: Your charity reports total program spending with no breakdown, OR your charity provides a program spending breakdown that does not match the amounts reported in the audited financials.
- **Nothing**: Your charity does not provide program spending information.

	For your whole charity
Ideal	10
Good	7
Something	3
Nothing	0

Section 2: Activities

Ideal example: Children's Cottage Society

In its 2018 annual report, Children's Cottage Society provides a detailed and clear breakdown of its expenses, with $ amounts for all programs. Viewers can easily determine which programs account for most of the charity's spending.

Statement of Operations

For the Fiscal Year Ended March 31, 2018

Funding Uses

Crisis Nursery	28.1%	$1,823,349
Brenda's House	16.6%	$1,079,829
Healthy Families	19.8%	$1,283,314
Community Respite Program	8.1%	$526,784
Rapid Rehousing	3.2%	$208,280
HomeLinks	7.5%	$484,401
HomeBridge	3.9%	$256,730
Adaptive Case Management	2.4%	$153,241
Administration	6.2%	$404,269
Fundraising	4.2%	$274,079
	100%	$6,494,276

CRITERIA FOR IDEAL	MET?
On website, not in financial statements	✔
Detailed breakdown: all programs	✔

Section 3: Outputs

Q7. Quantified outputs: Does your charity quantify its activity levels on a per-program basis?

Ci's Difficulty Rating: EASY

Purpose: Outputs are what your charity produces as a direct result of running its program(s). It quantifies how much, how many, or how often your charity delivered a service. Outputs represent what actually happened (stated in past tense). Reporting outputs on an "annualized, per-program basis" means that outputs are holistic for one year of running a program, not single-day or special event data accounting for a small portion of a full fiscal year.

- **Ideal**: Your charity reports two quantified outputs per program.
- **Good**: Your charity reports one quantified output per program.
- **Something**: Your charity reports approximated outputs (e.g. 'hundreds' or 'dozens',).
- **Nothing**: Your charity does not report quantified outputs for its programs.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

Ideal example: Canadian Organization for Development through Education (CODE)

CODE has two international programs:

READING CODE

Reading CODE is the comprehensive readership initiative at the heart of CODE's programs in developing countries. Together with our local partners, we work with teachers, librarians, writers, and publishers to support and sustain the development of literacy learning in schools from Kindergarten to Grade 12. Reading CODE is based on two essential elements: interesting books that are relevant to the readers and written in languages the readers understand; and meaningful engagement with these books through high quality teaching.

Reading CODE operates in 8 countries. For each, CODE provides the following data in its annual report:

SIERRA LEONE THIS YEAR:

7,559 boys and **7,769** girls benefited

25 project locations

176 teacher trainers trained.

5,329 educators trained

16,000 books distributed

33 writers, illustrators, and publishers trained

THE BURT LITERARY AWARDS

The Burt Literary Awards program is a literary award and readership initiative that recognizes excellence in young adult literature and provides young readers with engaging books that they want to read. Established by CODE in collaboration with the Literary Prizes Foundation, the Award addresses an ongoing shortage of relevant, quality books for young people, while at the same time promoting a love of reading and learning at the middle and secondary school levels.

First offered in Tanzania in 2008, the Burt Award is now offered in Ethiopia, Ghana, Kenya, Canada and the Caribbean and has resulted in the publication of over 220,000 copies of 45 new titles for young readers.

CODE provides overarching Burt Awards data in its annual report:

27 new children's and YA titles published in local and national languages

15 titles awarded with the CODE Burt Award

101,767 copies of high quality, relevant books distributed

CODE also provides details for each location the program runs in:

The CODE Burt Award for Caribbean Young Adult Literature

This year, 7,464 copies of the Burt Award winning books were delivered to 512 schools and libraries, and 388 community literacy programs in Trinidad and Tobago Guyana, Barbados and Jamaica, reaching over 62,000 youth.

CRITERIA FOR IDEAL	MET?
2 outputs for Reading CODE program?	Project Locations ✔ Books distributed ✔
2 outputs for Burt Awards program?	Titles awarded ✔ Books distributed ✔

Section 3: Outputs

Q8. Quantified beneficiaries: Does your charity quantify the number of people it helps?

Ci's Difficulty Rating: EASY

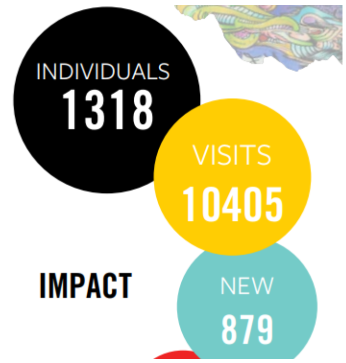
Purpose: This question is linked to Question 7. Your charity's beneficiaries, or clients, may include people, organizations, communities, patients, families, etc., reached by your programs. Quantified client data helps donors gauge your charity's reach. Similar to outputs, this data must be what actually happened (stated in past tense).

- **Ideal**: Your charity reports total number of people helped for the year with demographic breakdown and the number of people helped by program.
- **Good**: Your charity reports total number of people helped for the year with demographic breakdown OR the number of people helped by program.
- **Something**: Your charity reports total number of people helped with no breakdown, or total number of people helped since founding (cumulative).
- **Nothing**: Your charity does not quantify the number of people it helped.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

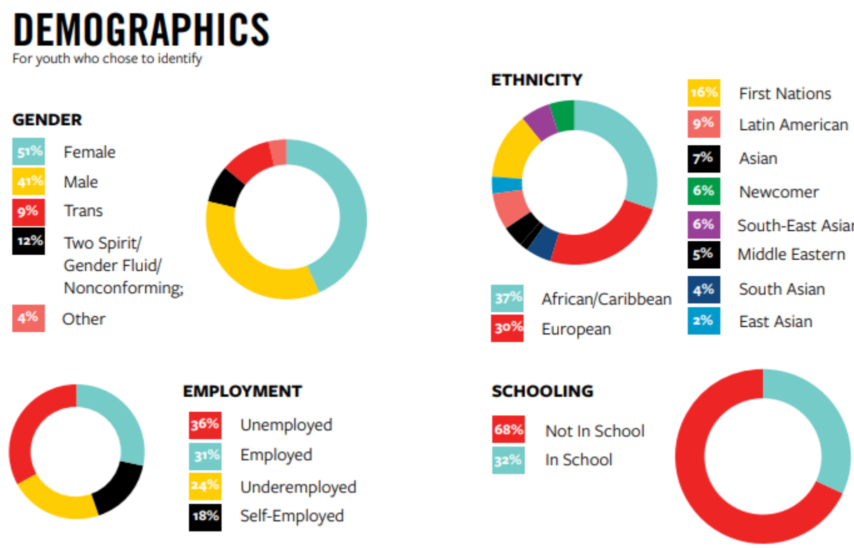
Section 3: Outputs

Ideal example: SKETCH



Total client count for the year: 1,318 people.

Demographic breakdown of total clients:



Breakdown of clients by program division: Discover, Develop and Launch:

CRITERIA FOR IDEAL	MET?
Total clients with demographic breakdown?	✔ ✔
Clients for each program?	Discover ✔ Develop ✔ Launch ✔

Section 3: Outputs

Q9. Data trends: Does your charity report output and/or client data from previous years?

Ci's Difficulty Rating: EASY

Purpose: Donors cannot gauge whether a program is growing or shrinking from a single year of output data. By providing year-to-year comparisons, donors can see trends and growth in your charity's programs.

Note that this is scored on a per-program basis.

- **Ideal**: Two outputs provided for three consecutive years in contiguous text, table, or direct link.
- **Good**: One output provided for two consecutive years in contiguous text, a table, or direct link. This could be an absolute number and % change from last year.
- **Something**: Word comparisons for one output, or 2+ years of Annual Reports available on one page that report the same output(s).
- **Nothing**: No historical output data found.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

Ideal example: Princess Margaret Cancer Foundation

PMCF has a Social Results Reporting web page that provides historical data for multiple output/client metrics, including researchers funded, clinic visits, and medical treatments.

Research at the Princess Margaret, Year-Over-Year

	2017	2016	2015	2014	2013	2012	2011	2010
Publications	1,192	1,312	1,185	1,224	1,135	937	872	815
Total Researchers	333	373	399	376	361	300	262	245
Principal Investigators (CCRU Members)	251	293	315	297	280	220	182	165
Fellows, Residents and Grad Students	359*	656	450	528	549	483	381	433

**Princess Margaret Cancer Centre no longer counts short-term fellows in its annual calculations.*

Clinical Care at the Princess Margaret, Year-Over-Year

	2017	2016	2015	2014	2013	2012	2011	2010
Outpatient Clinic Visits	224,498	228,380	224,724	215,971	212,179	210,289	207,016	200,567
New Cancer Patients	17,797	17,751	18,033	17,460	16,952	17,999	18,585	12,328
Chemotherapy Treatments	47,677	37,754	34,851	34,851	34,739	31,025	30,881	29,801

CRITERIA FOR IDEAL	MET?
Two or more outputs?	✔
Three or more years	✔

Section 3: Outputs

Q10. Data comparability: Are your charity's output metrics reasonable for similar charities to report, allowing for comparison?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: If your charity reports metrics that are commonly provided by charities in your sector, it allows donors to infer your charity's scope in relation to these other charities in the same sector. Reporting common metrics may not represent the quality of your work, but it allows people to compare charities with relative ease.

- **Ideal**: Your charity reports output indicators that are standardized or common metrics, allowing for direct comparison with other charities.
- **Good**: Your charity reports output indicators that are reasonable for similar charities to report. Data on the number of people helped includes adequate context for donors to understand what these people actually received from your program.
- **Something**: Your charity's output and client data is not reported with enough detail/context for donors to understand how comparable it is to other charity data.
- **Nothing**: The charity's output metrics are specific to your programs, preventing comparison.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

Ideal examples:

Sector	Common metrics
Advocacy	Hours spent lobbying | Website hits, with time spent on page | Amount of ad space purchased to educate public
Animal welfare	Amount of food fed to animals in lb, kg | number of spay/neuter procedures performed | Amount of medicine provided by dose | Number of cage days
Arts & culture	Attendance rate for show/gallery/exhibition
Education	Education hours provided (with appropriate context) | Number of enrolled clients
Environment	Acres of land secured/protected/conserved
Hospital foundation	Number of grants with $ amounts | Funded hospital outputs (new admissions, discharges, length of stay, total patient days)
Palliative care	Number of bed nights | Length of stay of clients | New admissions | Patient days
Health: Prevention	Website hits, with time spent on page | Amount of ad space purchased to educate public
Health: Research	Number of studies funded with $ amount
Granting	Outputs of grantees
International aid	Number of vaccinations given | Amount of emergency relief provided (water, food) in common metric (L, lb, kg) | Amount of medication provided by dose
Social services: Addiction	Number of bed nights | Number of new admissions | Amount of food provided in lb, kg
Social services: At-risk youth	Number of bed nights | Number of hours of counseling | Amount of food provided in lb, kg
Social services: Food bank	Amount of food distributed/provided in lb, kg
Social services: Homeless shelter	Number of bed nights | Amount of food provided in lb, kg | Amount of medication provided by dose | Number of new clients
Social services: housing	Number of room nights
Sports & recreation	Hours of activities run, with adequate context on the activities

Section 3: Outputs

Q11. Data Timeliness: Are the charity's outputs clearly dated and current?

Ci's Difficulty Rating: EASY

Purpose: It typically takes 4-6 months from the end of a fiscal year to prepare and publish an annual report. So, output data is typically 4-6 months old by the time donors can access it. Ci considers data timely for up to 18 months.

- **Ideal**: All of your charity's output data is clearly dated and is less than 18 months old.
- **Good**: Your charity's output data is not explicitly dated but is presented in an annual report that is less than 18 months old, OR most but not all of your charity's output data is clearly dated and less than 18 months old.
- **Something**: Your charity's output data is clearly dated and is between 18 and 30 months old.
- **Nothing**: Your charity's output data is undated, OR clearly dated and more than 30 months old.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

Q12. Quantified output goals: Does your charity describe quantified and dated output goals for its programs?

Ci's Difficulty Rating: EASY

Purpose: Goals allow donors to make giving decisions based on your charity's expectations for future performance and how donated funds will be used.

- **Ideal**: Your charity has a program output goal that (1) is quantified, (2) has a 12-month target, and (3) has a mid-term or longer-term target.
- **Good**: Your charity has a program output goal that (1) is quantified, and (2) is dated.
- **Something**: Your charity has a program output goal that is quantified or dated, but not both.
- **Nothing**: Your charity does not mention output goals.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

Ideal example: Hope & Healing International (HHI, formerly Christian Blind Mission Canada)

HHI reports quantified output goals for each of its three major programs:

Prevention and Medical treatment

Hope and Healing International works with local partners to treat preventable and curable causes of blindness such as cataract, river blindness and trachoma. We work to identify and treat conditions like club foot and cleft lip, as early in a child's life as possible, to avoid or minimize permanent impairment.

Hope and Healing International's GOAL:

- To give 877,900 people preventive and curative medical care in 2018 (a 3% increase), 903,700 per year by 2021 (a 5% increase).
- To give preventive treatment to an additional 200,000 people at risk of disabling neglected tropical diseases in 2018, 300,000 additional beneficiaries by 2021.

Rehabilitation

Hope and Healing International works together with local partners and with our clients to develop custom rehabilitation plans that address physio and occupational therapy needs, assistive devices and other rehabilitation services. The goal is to make each child, each mom, each dad living with a permanent impairment or health condition as able and independent as he or she can be.

Hope and Healing International's GOAL:

- To distribute 61,900 assistive devices in 2018 (a 5% increase), 67,800 per year by 2021 (a 10% increase).
- To give 116,800 children and parents therapy and rehabilitation services in 2018 (increase 5%), 127,900 by 2021 (an increase of 15%).

Creating Equal Opportunities

Our work opens the door for people with disability to gain access to an education, open a business, earn a living, make friends and be part of their community, often for the first time in their lives.

Hope and Healing International's GOAL:

- To give 5,100 children with disability access to education services in 2018 (a 5% increase), 5,600 per year by 2021 (a 20% increase).
- To give 5,292 people with disability or caregivers of children with disability access to livelihood services (vocational training, loans, financial literacy training) in 2018 (increase 5%), 5,800 by 2021 (an increase of 15%).

CRITERIA FOR IDEAL	MET?
Goal is quantified?	✔
One-year target?	✔
Longer-term target?	✔

Section 3: Outputs

Q13. Data accuracy: Does your charity report outputs precisely and provide definitions, calculations, and/or methods of data collection when appropriate?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Donors need to understand what your charity's outputs mean. Some charities count clients as people who start the program; others count people who complete the program; and some count people in attendance midway through. When donors understand how your outputs are determined, they can make fair comparisons.

- **Ideal**: Your charity states its outputs precisely, provides definitions for outputs, and describes data collection methods when appropriate.
- **Good**: Your charity states its outputs precisely and mentions data collection methods when appropriate.
- **Something**: Your charity states its outputs in clear terms, but does not mention definitions or data collection methods.
- **Nothing**: Your charity states its outputs vaguely and does not mention definitions or data collection methods.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Good	2	4	7
Something	1	2	3
Nothing	0	0	0

Section 3: Outputs

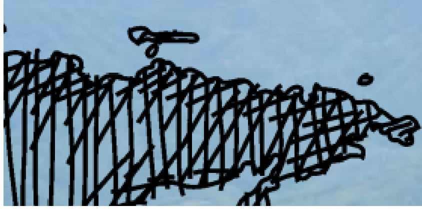
Ideal example: World Renew

In its annual reports, World Renew reports its outputs with exact numbers - no rounding. It also discloses how it calculates 'Participants.'

Where World Renew Worked in 2018

Country	Development Partners	Development Participants	Development Communities	Disaster Participants
1 Bangladesh*	5	163,354	46	352,348
2 Cambodia	5	22,833	100	
3 Canada**	1			111
4 Dominican Republic	1	314	15	
5 Ethiopia				18,138
6 Guatemala*	4	4,586	19	
7 Haiti	4	6,131	36	9,125
8 Honduras	5	6,626	30	
9 India	2	9,644	5	1,250
10 Kenya*	5	11,335	124	49,458
11 Laos	1	7,484		
12 Lebanon				6,535
13 Madagascar				7,040
14 Malawi*	1	38,557	91	
15 Mali	4	28,451	201	2,700
16 Mexico	1	312	4	700
17 Mozambique	1	12,756	88	1,638
18 Nepal				8,360
19 Nicaragua	6	2,574	67	
20 Niger*	2	11,542	102	
21 Nigeria	3	19,808	46	13,511
22 Philippines				8,100
23 Senegal*	2	524	6	
24 Sierra Leone*	1	1,950	24	400
25 Syria				32,460
26 Tanzania*	2	3,600	82	7,097
27 Uganda	5	5,050	70	17,863
28 United States***	1			38,259
29 Zambia	3	2,519	88	
TOTALS	65	359,950	1,297	575,093
Combined Beneficiary Total				935,043

* The number of participants varies year to year due to changes in grant funding, security, or partner transition. Participant numbers shown here represent all programs implemented in 2018.
** World Renew supports Diaconal Ministries Canada.
*** World Renew supports Communities First Association in U.S. development programs.
**** World Renew DRS reports by household. Participant totals are calculated by multiplying by three the total number of households served.



Note: In addition to 65 board-approved partners, World Renew worked with 14 partners in research and development in 2018.

CRITERIA FOR IDEAL	MET?
Outputs are precisely quantified?	✔
Definitions and data collection methods?	✔

Section 4: Outcomes

Q14. Mention of outcomes: Does your charity comment on outcomes for its programs?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Charities operate to create positive outcomes in their sector. Donors who give for 'results' are giving for outcomes. Ci recognizes that measuring outcomes quantitatively is tricky, so this a 'gimme' question. We look for *any* mention of outcomes from your charity's programs, including qualitative information.

- **Ideal**: Your charity mentions outcomes (e.g. testimonials, success stories, anecdotes, or staff impressions). The only requirement here is that your outcomes are in past tense, indicating they actually happened.
- **Something**: Your charity demonstrates that it is aware of possible outcomes from its programs, but does not describe any that actually happened (i.e. nothing in past tense).
- **Nothing**: No mention of outcomes found.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: Matthew's House Hospice

Matthew's House has a Testimonials page on its website where clients and client families share how the hospice helped them.

Matthews House Hospice

ABOUT US CLIENT INFORMATION & PROGRAMS OPEN PROGRAMS, EVENTS & NEWS SUPPORT US VOLUNTEER

CONTACT DONATE NOW

“I don't know what people would do without them.”

Matthews House helped ease my stress, kept me going and functioning reasonably, since I lost my husband. They do a lot for my mental and emotional health with extremely good support. They 've helped me deal with my loss and also to deal with caretaking of my mother, who has recently been diagnosed with dementia. When I think of Matthews House I think of all the support I get from them. I don't know what people would do without them. Without their support, I don't know what I would do

— G.B.

"Kindness and thoughtfulness is what sets you apart."

Matthews House is an amazing charity that I admire. The services you provide are numerous and greatly needed. The way in which you deliver your services, with such kindness and thoughtfulness, is what truly sets you apart. Your staff and volunteers go above and beyond for the benefit of the community. Thank you so much for all you do!

- Heidi

“Peace and comfort.”

I cannot thank you enough for the peace and comfort you provided my uncle in his last weeks of life. Unfortunately, I had moved out of the province right before he went into Matthews House and never got to visit, but I have heard nothing but amazing things from my family about the services you provide. Once again, thank you for everything that everyone did for Luke.

— Jessica

CRITERIA FOR IDEAL	MET?
Outcomes mentioned?	✔
Outcomes are in past tense?	✔

Section 4: Outcomes

Q15. Quantified outcomes: Does your charity report quantified outcomes for its programs?

Ci's Difficulty Rating: EXPERT ◆

Purpose: When your charity quantifies outcomes, donor can assess the scope and magnitude of your charity's results. For Majority programs, quantified outcomes should correspond to the majority of program dollars spent to fall in the Majority column. Outcomes are the measurable changes created as a result of your charity's outputs.

- **Ideal**: Your charity reports outcomes with absolute numbers, and the data is less than five years old.
- **Good:** Your charity reports outcomes that are percentages, approximately quantified numbers, or external study data, and the data is less than ten years old.
- **Something**: Your charity reports outcomes that are mathematically specific words (third, half, or majority. NOT many, several, or few).
- **Nothing**: Your charity does not report quantified outcomes for its programs.

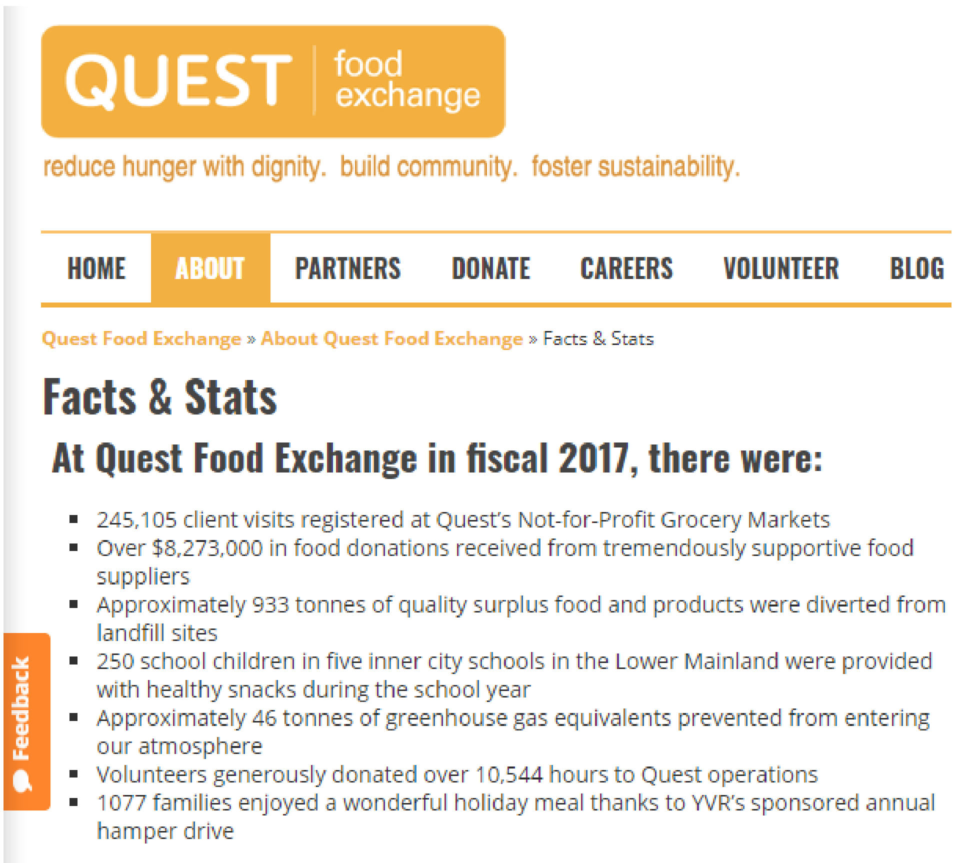
	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: Quest Outreach Society

Commonly called Quest Food Exchange, this charity's core program is food recovery and redistribution. The charity works with food banks and other community organizations to provide food to hungry people. On its website, there is a F2017 'Facts & Stats' page that reports multiple quantified outcomes:

- 933 tonnes of food diverted from landfill
- 46 tonnes of greenhouse gas equivalents prevented from entering the atmosphere



CRITERIA FOR IDEAL	MET?
Outcomes are absolute numbers?	✔
Outcomes are in past tense?	✔
Outcomes are for 1 year?	✔

Section 4: Outcomes

Q16. Data trends: Does your charity report quantified outcomes from previous years?

Ci's Difficulty Rating: EXPERT ◆

Purpose: The rationale behind this question is the same as Q9. Historical data allows donors to see trends in your charity's outcome performance. Because long-term outcomes are hard to measure year-over-year, Ci accepts period-to-period comparisons (e.g. every five years).

- **Ideal**: Quantified outcomes are provided for two prior periods, either in contiguous text/table or via direct links.
- **Good:** Quantified outcomes are provided for one prior period through one of the options outlined above.
- **Something**: Your charity provides word comparisons on its outcomes (e.g. greater/less than) for one prior period, or your charity has multiple years of Annual Reports posted on one page with the same outcome indicator clearly presented in both reports.
- **Nothing**: No comparison of your charity's outcomes to prior periods.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: JUMP Math

National Book Fund annually evaluates the JUMP Math program. Its major outcome is "average student growth rate related to WRAT-4," which quantifies the average improvement in JUMP Math student test scores relative to non-JUMP Math equivalents. It uses a math computation sub-test of the Wide Range Achievement Test (WRAT-4).

"Relative growth in math achievement" (relative to WRAT-4 standardization sample) is defined as the ratio of (1) observed growth to (2) expected growth in student scores.
(1) Observed growth: difference between a student's actual test scores in spring and fall.
(2) Expected growth: difference between a student's expected spring score and actual fall score, where expected spring score: calculated raw score in spring that would result in the same standard score the student obtained in the fall. More details can be found in the full report, available here.

Table II: NBF Student Test Results

		School Year						
		2017-18	2016-17	2015-16	2014-15	2013-14	2012-13	2011-12
# of students tested in both fall & spring		240	310	208	248	241	286	326
Grades tested		4 to 7	4 to 6	4 to 7	3 to 9	4	4 to 7	3 and 6
SS fall vs SS spring	Pre[1]	89.5	88.1	92.4	86.9	89.6	90.8	96.8
	Post[2]	96.1	93.0	97.0	92.3	95.3	94.6	100.9
Percentile rank	Pre	24th	21st	30th	19th	25th	27th	42nd
	Post	39th	32nd	42nd	30th	37th	37th	53rd
Average student growth relative to WRAT-4		2.8x	2.5x	2.4x	2.9x	2.5x	2.8x	1.8x
Percent of students scoring 'avg and above'	Pre	50%	44%	55%	37%	46%	53%	74%
	Post	69%	56%	63%	55%	65%	64%	80%
Percent of students scoring 'above average'	Pre	4%	3%	12%	3%	5%	7%	10%
	Post	10%	9%	20%	9%	10%	12%	22%
Percent of students scoring 'below average'	Pre	50%	56%	45%	63%	54%	47%	26%
	Post	31%	44%	37%	45%	35%	36%	20%

[1] 'Pre' refers to WRAT-4 tests administered in the Fall
[2] 'Post' refers to WRAT-4 tests administered in the Spring

CRITERIA FOR IDEAL	MET?
Outcomes provided for 2 prior periods?	✔
Data in contiguous text/table?	✔

Section 4: Outcomes

Q17. Data comparability: Are your charity's outcome metrics comparable to what similar charities could report?

Ci's Difficulty Rating: EXPERT ◆

Purpose: The rationale behind this question is the same as Q10. Being able to compare your charity's outcomes to similar charities helps donors learn more about your charity's scope in its respective sector.

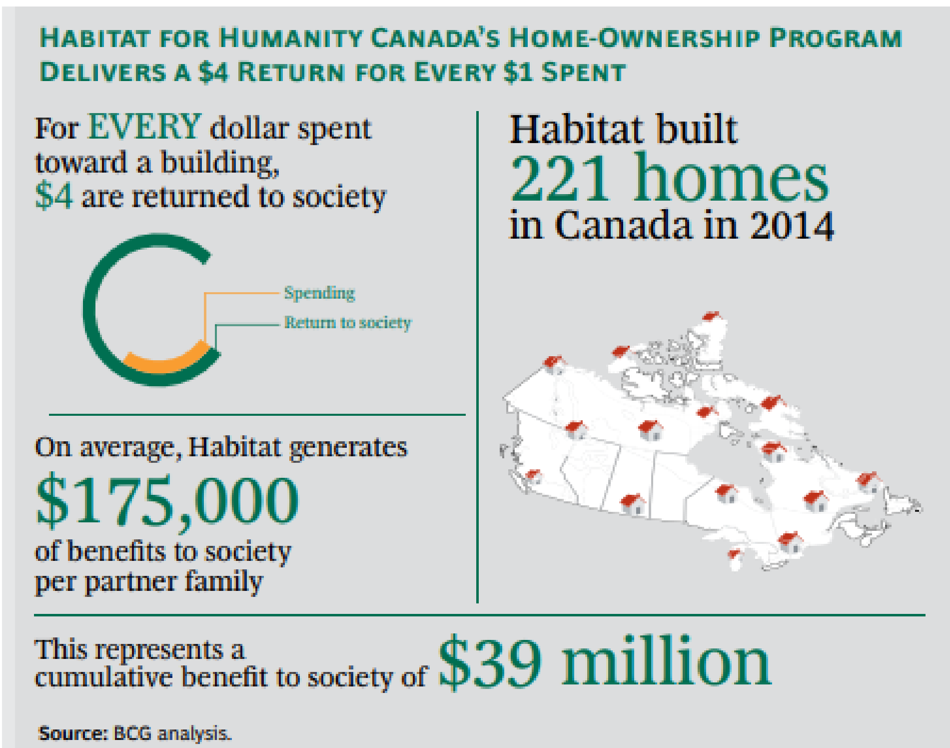
- **Ideal**: Your charity's outcome indicators are standardized or common metrics. This could include what you report to government or other standards-setting body.
- **Good:** Your charity's outcome indicators are reasonable for similar charities to report.
  - For medical research, publications in journals is Good.
- **Something**: Your charity's outcome indicators meet Good or Ideal requirements but are more than ten years old.
- **Nothing**: Your charity's outcome indicators are specific to its programs, preventing comparison.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: Habitat For Humanity Canada (HFHC)

HFHC underwent a social audit by Boston Consulting Group (BCG) in 2015. One of the major outcomes calculated by BCG in the report is 'social return on investment,' or SROI. This outcome represents how much added value a charity's work returns to society per $1 donated. HFHC's SROI was 4:1. More details on how this value was calculated are provided in the full report, available here. SROIs offer a standardized metric that can be used to compare charities operating in different sectors.



CRITERIA FOR IDEAL	MET?
Outcome is in a standardized metric?	✔
Outcome metric can be compared across charity sectors?	✔

Section 4: Outcomes

Q18. Data timeliness: Are your charity's outcomes clearly dated and current?

Ci's Difficulty Rating: EXPERT ◆

Purpose: The rationale behind this question is the same as Q11. However, outcome measurements are usually harder to make than output measurements: they may take time to present themselves, the measurement process may be complex, and reconnecting with past clients can be hard. When annual measures are possible, donors would benefit from seeing annual data from your charity. However, if your charity uses third-party evaluations to measure outcomes, in-depth studies up to 5 years old are considered timely.

- **Ideal**: If your charity's outcomes are self-compiled, they are explicitly dated within the past 18 months. If your charity's outcomes are measured via third-party evaluations, the studies are published within the past five years.
- **Good:** If your charity's outcomes are self-compiled, they are not explicitly dated but provided in a report dated within the past 18 months (such as an Annual Report). Or, your charity's outcome data includes a mix of current and outdated data, such as cumulative outcomes since program inception.
- **Something**: If your charity's outcomes are self-compiled, they are explicitly dated between 18 and 30 months old. If your charity's outcomes are measured via third-party evaluations, the studies are published over five years ago.
- **Nothing**: The outcomes your charity reports are not dated.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Q19. Outcome longevity: Does your charity wait to assess its outcomes to measure its long-term effects?

Ci's Difficulty Rating: EXPERT ◆

Purpose: When your charity measures outcomes some time after your programs end, donors can be more certain that your charity's programs have lasting effects. However, the longer you wait to evaluate outcomes, the more difficult and expensive the process gets. So, any data that speaks to long-term effects gets some credit.

Exception: 'survival' outcomes linked to providing basic human needs (food, shelter, clothes) score **Nothing** for this question unless your charity measures the long-term outcome of providing such services.

- **Ideal**: Your charity measures its outcomes more than 12 months after your programs end.
- **Good:** Your charity measures its outcomes between 6 and 12 months after your programs end.
- **Something**: Your charity measures its outcomes less than six months after your programs end.
- **Nothing**: No way to tell when your charity measured its outcomes.

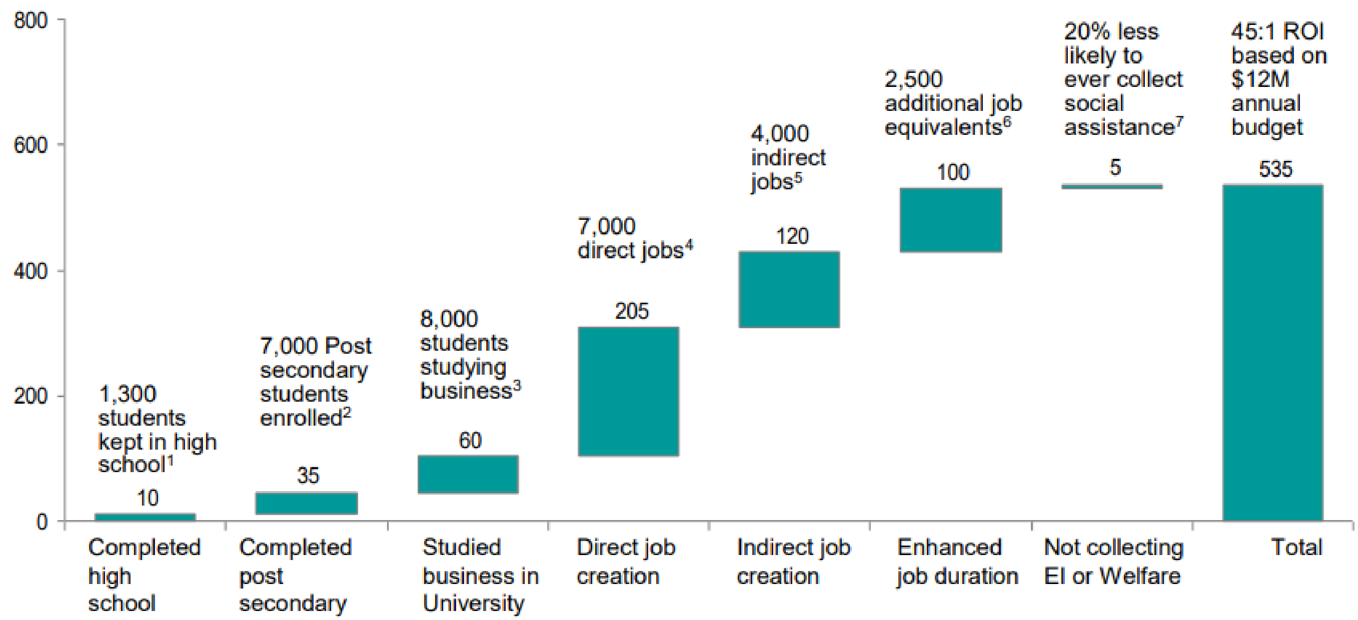
	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: Junior Achievement Canada (JAC)

JAC hired Boston Consulting Group (BCG) to do a social audit on its Junior Achievement (JA) program in 2010. All outcomes evaluated by BCG were **based on data collected by past 'Achievers' aged 20 or older (program alumni)**. Because the JA program **works with high school students**, it is fair to assume these outcomes were measured over 12 months after program completion.

$45 annual return created per JA program dollar



1. Based on proportion of Achievers over 20 years of age with high school diploma versus average Canadian who credit JA with keeping them in high school, annual value of high school completion in isolation form other higher education assumed $5,000. 2. Based on proportion of Achievers over 20 enrolled in or completed post secondary versus average Canadian who credit JA with enrolling in post secondary. Annual value of post secondary completion in isolation from other higher education assumed at additional $5,125. 3. Based on proportion of Achievers over 20 enrolled in or completed University business degree versus average Canadian who credit JA with enrolling in business program. Annual value of business program completion in isolation from other higher education assumed at additional $7,700. 4. JA grads launch ~6,500 businesses per year, 50% more than Canadian average, 70% of JA SME founders credit JA as the transformational event that gave gave them the confidence and skills to open their business, respondents report average number of jobs per company at 6 for a total of ~8,000 JA attributable jobs in any given year. Average salary is $28,920. 5. Uses BEA indirect job multiplier of 1.57 for an additional 4,500 jobs and identical value assumptions as footnote 1 above. 6. JA companies last 30% longer than the average Canadian company resulting in the equivalent of an additional 2,500 jobs created – all other assumptions identical to footnotes 4 & 5 above. 7. Based on average payments of $500 per month average duration of benefits being 1 year – annualized by dividing by total years worked.
Source: Regional Input-Output Modeling System (RIMS) II, U.S. Bureau of Economic Analysis (BEA), U.S. Department of Commerce. Statistics Canada, Economic Value of Business Education; Access Economics, Industry Canada, Business Development Bank of Canada, CGA Entrepreneurship report, Canada Revenue Agency, BCG Analysis

CRITERIA FOR IDEAL	MET?
Outcome measured > 12 months after program ended?	✔

Section 4: Outcomes

Q20. Quantified outcome goals: Does your charity describe dated and quantified outcome goals for its programs?

Ci's Difficulty Rating: INTERMEDIATE

Purpose:The rationale behind this question is similar to Q12. Ci rates this question more difficult than Q12 because identifying metrics and informed targets for outcomes can be harder than for outputs.

- **Ideal:** Your charity describes output goals that are quantified and dated, with both (1) a 12-month target and (2) either a mid-term or longer-term target.
- **Good:** Your charity describes outputs goals that are quantified and dated, with either a 12-month or long-term target.
- **Something:** Your charity describes outcome goals that are either quantified or dated (not both). If not dated, the goals should be attainable and can be assessed within five years.
- **Nothing:** Your charity does not describe any quantified or dated outcome goals.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Good example: Movember Canada

Movember Canada distributes funding for research in prostate and testicular cancer, men's health, and men's mental health. In its F2018 annual report, it states long-term goals for each of these three areas:

MOVEMBER®
FOUNDATION

ANNUAL REPORT 2018

OUR 2030 GOALS

Halve the life expectancy gap between men and women

Reduce the number of men dying prematurely by 25%

Halve the number of men dying from prostate cancer and testicular cancer

Reduce the rate of male suicides by 25%

Ideal: For full points, additional granularity on the timeline of these metrics is necessary. This could be achieved by stating mid-term targets that the charity hopes to reach by F2024.

Section 4: Outcomes

Q21. Data accuracy: Are your charity's outcomes stated precisely, with definitions and/or calculations when appropriate?

Ci's Difficulty Rating: EXPERT

Purpose:The rationale behind this question is similar to Q13. Donors should be able to understand what your charity's outcomes mean and how they are measured. Outcomes can be hard to collect and collection methods are rarely consistent between charities. Because of this, it is important to define outcome measurement and/or collection methods.

- **Ideal**: Your charity's outcomes are precise numbers and you have an appendix that includes outcome definitions, methods of data collection, and/or methodologies, when appropriate (sample sizes, assumptions, calculations, etc).
- **Good**: Your charity's outcomes are precise numbers, and you summarize data collection methods, when appropriate.
- **Something**: Your charity's outcomes are stated relatively clearly but there is no description of data collection methods.
- **Nothing**: Your charity's outcomes are vaguely stated and you do not mention definitions or methods of data collection.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 4: Outcomes

Ideal example: University of Saskatchewan (UoS)

UoS underwent a social audit in 2015 by RTI International to measure the charity's economic impact in Canada. UoS provides links to two reports: the Final 'Economic Impact Study' and the 'Economic Impact Study with technical appendix.'

Major outcomes reported include:

$1.3 Billion
IMPACT ON THE SASKATCHEWAN ECONOMY

Given its size and breadth of operations, the U of S has a significant impact on the economy. It contributed $1.3 billion in gross domestic product (GDP)-

16,000 jobs
SUPPORTED ACROSS SASKATCHEWAN

About 16,400 jobs across the province are tied to the U of S (2.9% of the provincial total). This means that for every 1 job at the university, roughly 1.6 jobs are provided elsewhere across the province.

The technical report provides detailed explanations about how each outcome was determined. Images below are of the report's Table of Contents, to show the type of information and level of detail in the report.

Section 5: Quality

Q22. Reliability: Have your charity's program results been reviewed by a third party?

Ci's Difficulty Rating: BONUS ◆◆

Purpose: If your charity hired a third-party to evaluate its program performance, it adds an extra level of confidence in your data. This process is expensive though, so Ci considers this question a 'bonus.'

Note: audited financial statements do not count for this question.

- **Ideal**: One of the following:
  - Your charity underwent a social audit from an accredited source. Donors can read the letter of assurance.
  - Your charity hired a third party to evaluate its program(s), which included controls and provides results on key program metrics.
- **Good**: One of the following:
  - Your charity mentions a social audit or third-party evaluation, but does not give details.
  - Your charity hired a third party for an independent assessment of your program(s) but the evaluation did not involve controls.
- **Something**: Your charity indicates some degree of independence in evaluating program performance (e.g. an independent member added to a program assessment team, a program assessment team that is independent of the team running the program).
  - Imagine Canada Standards accreditation or CARF accreditation meet this requirement.
- **Nothing**: Your charity does not mention any independent program assessment.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 5: Quality

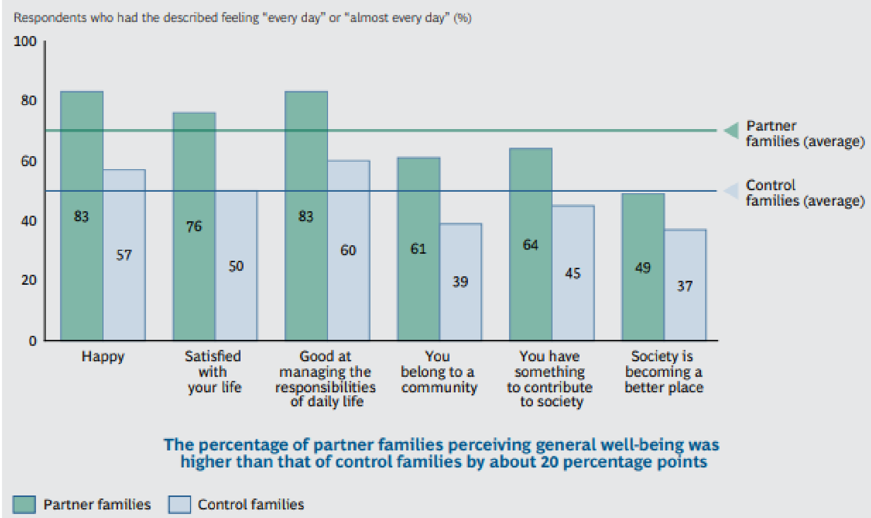
Ideal example: Habitat For Humanity Canada (HFHC)

HFHC hired Boston Consulting Group (BCG) to perform a detailed evaluation of its flagship home ownership program in 2015.

BCG's assessment included HFHC's Social Return on Investment ($4 per $1 spent) as well as multiple outcomes for partner families compared to control families.

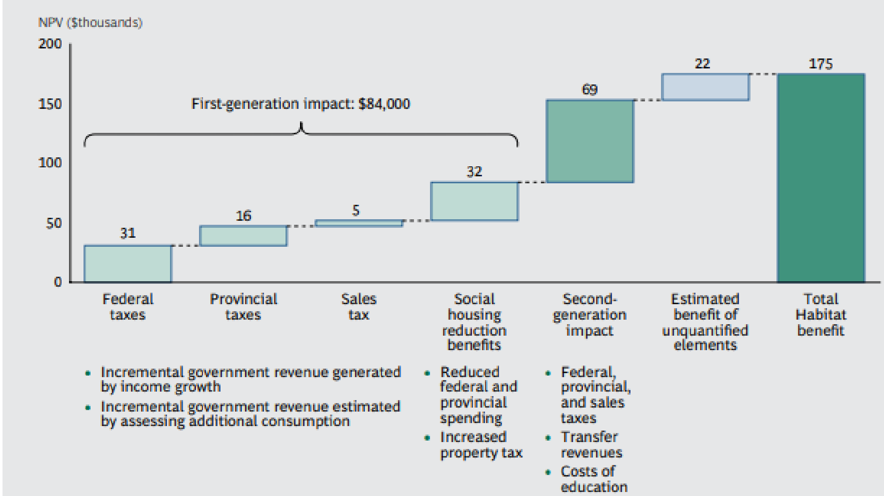
Exhibits 1 and 3 provide details on each of these assessments, respectively.

EXHIBIT 1 | General Well-Being Is Higher for Partner Families



Sources: Habitat for Humanity Canada homeowner survey; IPSOS survey; BCG analysis.

EXHIBIT 3 | Habitat Generates $175,000 in Societal Value for Every Partner Family That Completes the Program



Sources: Habitat for Humanity Canada homeowner survey; IPSOS survey; BCG analysis.
Note: NPV = net present value. First-generation impact was calculated for a period of 25 years; second-generation impact was calculated for a period of 45 years. A discount rate of 3.6 percent was employed, which was equivalent to the ten-year average return on a 30-year Canadian bond.

CRITERIA FOR IDEAL	MET?
Social audit by accredited source?	✔
Results on key metrics provided?	✔
Evaluation includes controls?	✔

Section 5: Quality

Q23. Clarity: Does your charity provide output and outcome information for most of your programs? Is this information easy to find?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Donors have limited time. They should not have to dig for key information about your charity's programs, outputs, and outcomes - these results should be easy to find. Factors to consider include: the number of clicks a donor must make to access important data on your charity's website; whether clear headers and sections make your website easy to navigate; whether key social results data is buried in paragraphs of text.

- **Ideal**: Your charity's results are easy to find. Key output and outcome data is clearly summarized for all core programs.
- **Good**: Your charity's results are relatively easy to find, with some room for improvement (e.g. donors have to make inferences, synthesize information, or dig for particular program results).
- **Something**: One of the following:
  - Your charity's results require a substantial amount of time and effort to find.
  - Your charity would otherwise score Good or Ideal, but there is minimal output and/or outcome information provided.
- **Nothing**: Your charity does not report on its social results.

	All
Ideal	10
Good	7
Something	3
Nothing	0

Section 5: Quality

Ideal example: Calgary Food Bank

Check out Calgary Food Bank for a great example of clear, comprehensive, and easy-to-find results reporting. Most of the information Ci looks for in the 26 Keystone Questions can be found in one of three places:

(1) Calgary Food Bank's 'About' page - info on Strategy
(2) Calgary Food Bank's annual reports - info on Strategy, Activities, Outputs and Outcomes
(2) Calgary Food Bank's 'Charity Intelligence' page - covers Activities, Outputs and Outcomes

Calgary Food Bank consistently earns an A+ grade in Results Reporting when evaluated by Charity Intelligence.

Section 5: Quality

Q24. Balance: Does your charity present a candid view of program performance, including both positive and negative information?

Ci's Difficulty Rating: EASY

Purpose: Donors appreciate when charities provide more information than just 'marketing fluff.' Your charity's communications (newsletters, annual reports, etc.) should focus on informing, not selling. Your charity should report a well-rounded picture of its program performance, reporting what went well and what did not go well. Negative information may include failure to meet program goals, major setbacks, or other disappointing performance.

- **Ideal**: Your charity has quantified data (i.e. absolute numbers) that describes negative program performance.
- **Good**: Your charity describes negative program-related information through word comparisons or percentages (no way to calculate absolute numbers).
- **Something**: Your charity mentions poor program performance but does not use numbers.
- **Nothing**: Your charity provides only positive, upbeat information regarding its program performance.

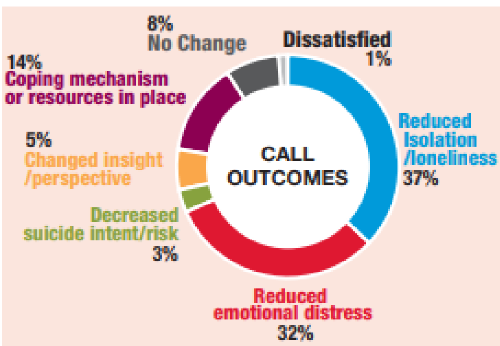
	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 5: Quality

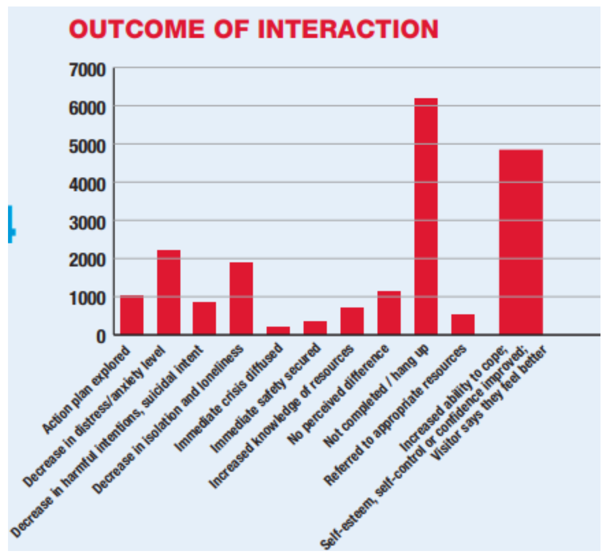
Ideal example: Distress Centres Toronto (DCT)

In its annual report, DCT reports negative performance indicators for multiple call/chat programs.

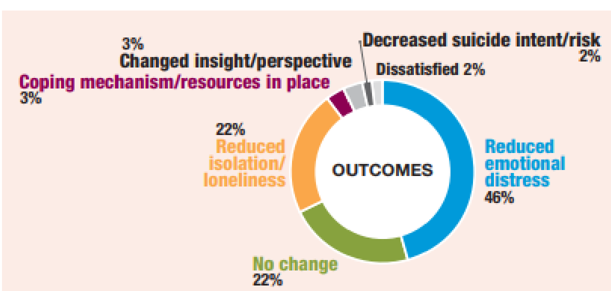
OVERALL chat experience data: Dissatisfied clients



ONTX (Online Text and Chat) call outcomes: No perceived difference, hang-ups



CAMH Warm Transfer Line call outcomes: Dissatisfied clients, no change.



Suicide & Homicide Loss Survivor Support programs: client wait time for help

CRITERIA FOR IDEAL	MET?
Negative charity performance?	✔
Information quantified?	✔

Also worth mentioning: Engineers Without Borders (EWB) Canada. EWB Canada does something unique among the charitable sector. Every year it releases two publications: an Annual Report AND a Failure Report. Check it out here.

Section 5: Learning

Q25. Program-related learning: Does your charity describe what it has learned about its program performance over the past two years?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Monitoring your charity's program performance using tracked metrics generates data that you can (and should!) reflect on and learn from. Tracked metrics can help you identify how best to operate your programs.

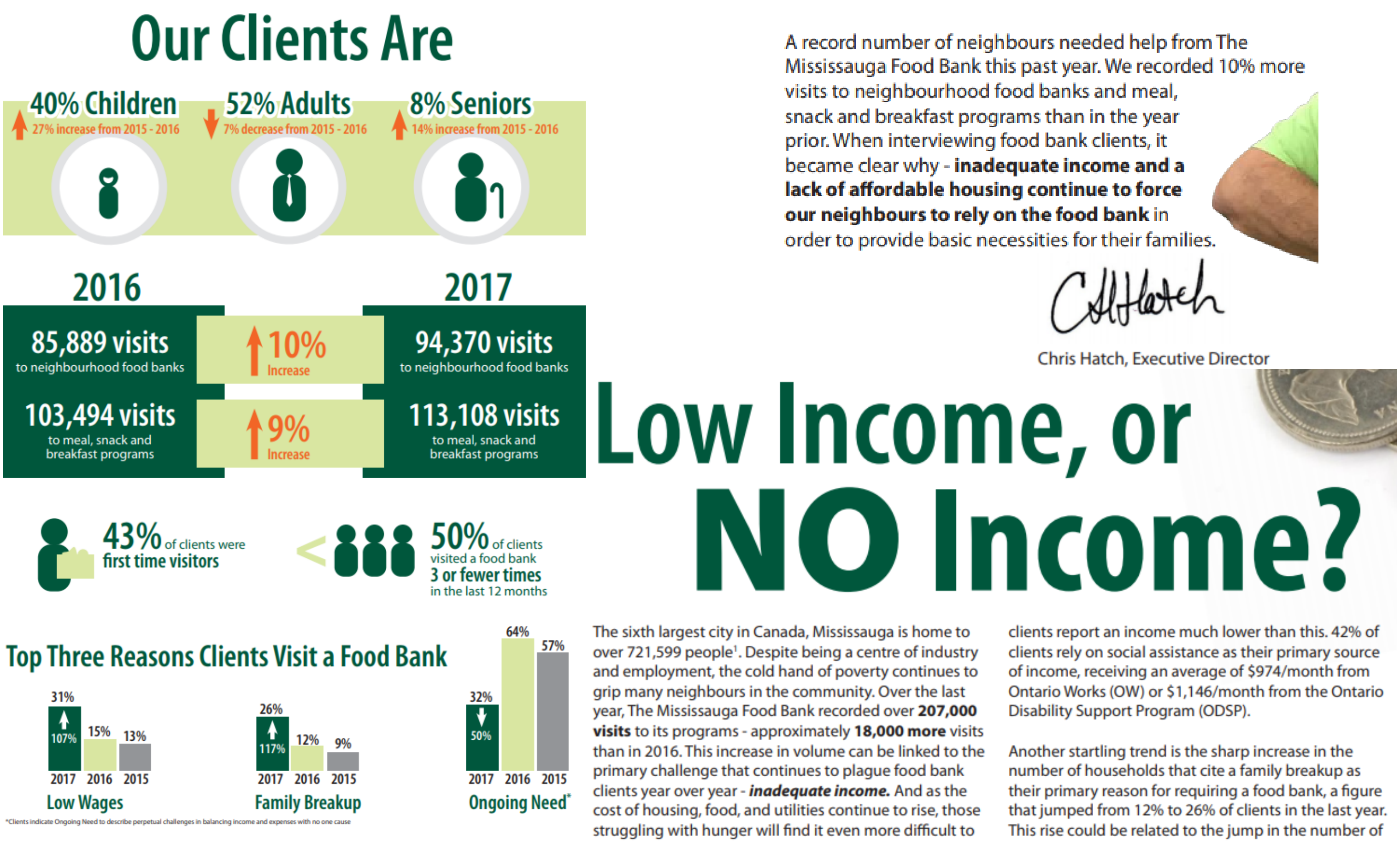
- **Ideal**: Your charity describes detailed program-related information learned over the past two years and links it to one or more tracked metrics.
- **Good**: Your charity describes detailed program-related information learned over the past two years, but it is not linked to tracked metrics.
- **Something**: Your charity describes general program-related information learned over the past two years.
- **Nothing**: Your charity does not mention any program-related learning made over the past two years.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

Section 5: Learning

Ideal example: Mississauga Food Bank (MFB)

In its 2017 "The Face of Hunger in Mississauga" report, MFB describes what it learned about the city's current hunger status based on year-over-year changes in tracked metrics like Visit count, Age of clients (child, adult, or senior), and Income source of clients.



A record number of neighbours needed help from The Mississauga Food Bank this past year. We recorded 10% more visits to neighbourhood food banks and meal, snack and breakfast programs than in the year prior. When interviewing food bank clients, it became clear why - **inadequate income and a lack of affordable housing continue to force our neighbours to rely on the food bank** in order to provide basic necessities for their families.

Chris Hatch, Executive Director

Low Income, or NO Income?

The sixth largest city in Canada, Mississauga is home to over 721,599 people[1]. Despite being a centre of industry and employment, the cold hand of poverty continues to grip many neighbours in the community. Over the last year, The Mississauga Food Bank recorded over **207,000 visits** to its programs - approximately **18,000 more** visits than in 2016. This increase in volume can be linked to the primary challenge that continues to plague food bank clients year over year - ***inadequate income.*** And as the cost of housing, food, and utilities continue to rise, those struggling with hunger will find it even more difficult to cover basic living necessities.

If having an "adequate income" means that an individual or family is able to afford the basic costs of living in their city, the majority of food bank clients are unable to meet this standard. Most simply do not earn enough to pay for basic needs. While the average income of a Mississauga food bank client is approximately $1,414/month, many clients report an income much lower than this. 42% of clients rely on social assistance as their primary source of income, receiving an average of $974/month from Ontario Works (OW) or $1,146/month from the Ontario Disability Support Program (ODSP).

Another startling trend is the sharp increase in the number of households that cite a family breakup as their primary reason for requiring a food bank, a figure that jumped from 12% to 26% of clients in the last year. This rise could be related to the jump in the number of clients reporting no income whatsoever. **A staggering 20% of clients indicated that they are not currently receiving any support from the government, family or employment.** This increase in 'no income' clients is paired with a 25% decrease in the number of clients whose primary income is employment, suggesting that job security and employment are growing and stressful concerns for food bank clients.

CRITERIA FOR IDEAL	MET?
Explains what was learned?	✔
Tracked program metrics used?	✔

Section 5: Learning

Q26. Informed program changes: Does your charity make program changes based on what it has learned?

Ci's Difficulty Rating: INTERMEDIATE

Purpose: Building on the purpose of Q25, it is important for your charity to make smart program changes, when needed, based on what it has learned. If programs remain the same over time, they become ineffective as the world changes and your primary clients' needs change. Your charity should adapt, create, and/or end programs according to what does and does not work.

- **Ideal**: Your charity describes, in detail,a program change made in the past year. You justify the program change using what you learned about the program, based on tracked metrics.
- **Good**: Your charity describes a program change made in the past year, or explains why no program changes were made, based on key learning that is not linked to tracked metrics.
- **Something**: Your charity mentions a small program change made in the past year, or you explain why no program changes were made, without any link to key learning.
- **Nothing**: Your charity does not mention any program changes made during the year and does not give reasons for not changing anything.

	Minority of programs	Majority of programs	All programs
Ideal	3	7	10
Something	1	2	3
Nothing	0	0	0

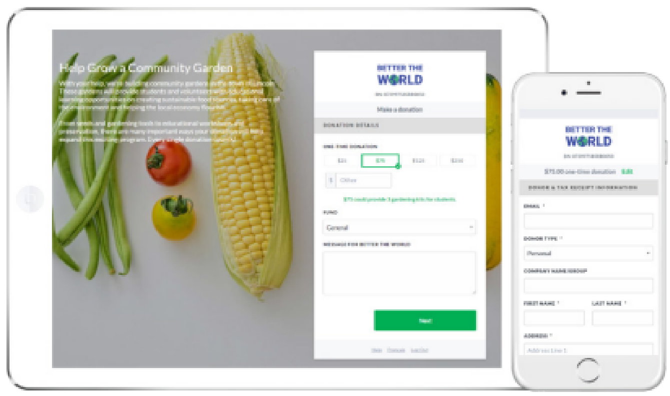
Section 5: Learning

Ideal example: CanadaHelps

CanadaHelps offers an online donation platform to bridge the gap between donors and charities, which helps all charities, regardless of size, access effective fundraising technologies. In its 2018 annual report, CanadaHelps talks about Customizable Donation Forms, a new tool it introduced for charities during the year based on key learning about Canadian donors.

Customizable Donation Forms

A good user experience means a visitor is more likely to become a donor. We pay close attention to how visitors interact with our forms, and follow the latest in e-commerce best practices so charities don't have to.



Simple and flexible forms. Donors give for different reasons and at different times, and it is essential that charities have the flexibility to create Customizable Donation Forms with the messages and options that are appropriate for the circumstance.

- Giving in honour or in memory of a loved one is often a deeply personal 1
experience. It is also a common experience, with tribute gifts representing 8% of non-recurring gifts through CanadaHelps. This year we introduced Tribute-first
2 Customizable Donation Forms which put gift dedication options at the top of the form. Charities can customize thank you messages and eCards that are right for this type of gift.

CRITERIA FOR IDEAL	MET?
Learning with tracked metrics	✔ (1)
What was changed/implemented	✔ (2)

- Monthly giving is one of the fastest growing ways to give through CanadaHelps,
1 representing 17% of all donations, and these gifts ensure charities have access to stable funding throughout the year. Both our one-page and multi-step forms can now be created for monthly or single giving only, or with the option for both. This simplifies the experience for donors when they've reached the form from a charity's Ways to Give page.

Optimized experience for best outcomes.
Our newly rebuilt Customizable Donation Forms are optimized to maximize donations, and now offer two beautiful, mobile-ready formats: our traditional one-page form, now 2
with a cleaner design and more efficient use of space across device types to make the form approachable and easy to complete, and a multi-step form, which leads the donor through three simple steps to complete their donation.

1 With 34% of visitors to donation forms coming from a mobile phone or tablet, it is critical to make regular enhancements to form design to take advantage of new technical capabilities and best practices. We completed extensive mobile-optimization work to make full use of the visitor's screen real estate and increase the number of visitors that complete their donation.