

MONEYSense CHARITY 100 QUESTIONNAIRE

CHARITY NAME			
CONTACT NAME		TITLE	
PHONE NUMBER		E-MAIL	
MAILING ADDRESS			

"X" off the appropriate box with your response

#	Question	Yes	No
1	Does your board of directors or a board committee approve the following:		
A	the annual operating budget		
B	audited financial statements		
C	fundraising policies		
D	governance policies		
E	a formal process to identify the organization's major strategic and operational risks		
F	a formal, multi-year strategic plan		
G	Canada Revenue Agency filings		
2	Is the most senior staff person's total compensation package approved by the board of directors or a board committee?		
3	Are expenses of the senior staff member reviewed by a member of the board?		
4	What was the total compensation (salary, bonuses and benefits) of the highest paid person at the organization during 2011 ?	\$ _____	
5	Does the board or board committee review the performance of board chairs, committee chairs and individual directors annually?		
6	Has the board formally adopted a written code of ethics for directors, staff, and volunteers?		
7	Is there a conflict of interest policy covering board members and staff?		
8	Is there a formal process to orient new board members to ensure they understand their legal and fiduciary responsibilities and are fully informed on the organization's finances?		
9	How often does the board meet per year?	# _____	
10	Are board members paid (directly or indirectly) for their services to the organization in their capacity as directors?		
11	Does the organization have an investment policy?		
12	Is there a process in place for measuring the effectiveness of the organization's programs?		
13	Does the board regularly review the cost-effectiveness of the organization's fundraising programs to ensure no more money will be spent on administration or fundraising than required?		
14	Does the board or a board committee review the actual revenues and expenses versus the budget at least quarterly?		
15	Does the organization rent, trade or share donor lists?		
16	If the answer to question 15 (above) was YES, does the charity ensure donors' requests to be excluded from lists are honoured?		
17	Does the organization sell its donor list?		

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#	Question	Yes	No
18	Does the organization directly or indirectly pay fundraisers finder's fees, commissions or percentage compensation based on contributions?	<input type="checkbox"/>	<input type="checkbox"/>
19	Does the organization have a significant amount of money in reserve that you could access for operational purposes that is not included in line 4100, 4130 or 4140 of your 2011 CRA T3010 Return? If so please list the amount in the space provided. We may include this amount in your organization's reserve calculations upon verification of your financial statements.	\$ _____	
20	In 2011 , did you accumulate a significant amount of money through fundraising that is earmarked for a future capital project?	<input type="checkbox"/>	<input type="checkbox"/>
21	If you answered YES to question 20, please give the name of the project and the amount of money raised for it in 2011 : _____	\$ _____	
22	How many volunteers were affiliated with your organization in 2012 ?	# _____	
23	How many individual donors contributed to your organization in 2012 ?	# _____	
24	Please describe your charity's mandate and identify key accomplishments in 2012 below. Submissions should be 150 words or less. We reserve the right to edit for length and clarity.		