# **Balanced Scorecard**

Strategic tool for assessing the performance, impact, and potential growth for an organization.



### **RETENTION | SATISFACTION | VALUE**

**Efficiency Score** 

looks at how long it takes for documents to go through our system and the number of custom plans we have for the people we serve

#### **Satisfaction Survey**

measures how the people we serve feel about Lifeworks

#### **Demits to Competitors**

tracks the number of people who left Lifeworks to go somewhere else to receive services

## NEW PROJECTS | NEW REVENUE STREAMS

#### Active Innovation Projects in Stage-Gate Process tracks the number of new projects and predicts their impact

# EFFICIENCY | QUALITY

**Compliance Index** calculation of risk associated with our current compliance with industry regulations and government legislation **Cost Per Person Served** 

calculation of the average cost to provide a person support in each service

# CAPITAL | CULTURE | INFRASTRUCTURE | TECHNOLOGY

# CAPACITY

INNOVATION

INTERNAL PROCESSES

#### Employee Engagement Survey measures how connected staff feel to Lifeworks Employee Turnover Rate calculation of the percentage of staff who leave Lifeworks Organizational Diversity calculation of the percentage of staff who identify with a race

other than white and/or have a disability

FINANCIAL

# EFFECTIVE RESOURCE USE | FINANCIAL PERFORMANCE

#### Fund Balance

calculation of the difference between assets and liabilities **Fundraising Net Revenue** year-to-date calculation of the amount raised less the cost to fundraise **Overall Margin** calculation of the difference between the revenue and the business cost