

2020

BALANCED SCORECARD

Lifeworks

A nonprofit serving people with disabilities

Results as of 03/31/2020

Strategic tool for assessing performance, impact, and organizational growth.



PEOPLE WE SERVE

Retention | Satisfaction | Value

Customer Value - Day Services ●

Evaluates how well we support the choices and opinions of the people we serve

Efficiency Score Customer Value - Fiscal Services ●

Looks at how long it takes our fiscal team to reach out to our customer once we have everything to start services

Satisfaction Survey ●

Measures how the people we serve feel about Lifeworks

Demits to Competitors ▶

Tracks the number of people who left



INNOVATION

New Products | New Revenue Streams

Active Innovation Projects in Stage-Gate Process ●

Tracks the number of new projects and predicts their impact

Income Diversification ▶

Expanding services outside of existing Medicaid funding



INTERNAL PROCESSES

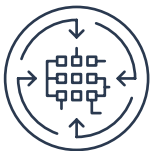
Efficiency | Quality

Compliance Effectiveness Score ▶

Examines our quality and compliance within our industry regulations and government legislation

Cost Per Person Served ▶

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



CAPACITY

Capital | Culture | Infrastructure | Technology

Employee Engagement Survey ●

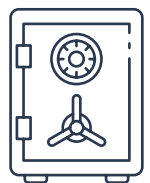
Measures how connected staff feel to Lifeworks

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 PROCESSES

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

Current Ratio ▶

Measures Lifeworks ability to maximize existing assets

Legend: ● On Goal ▶ Needs Attention