

How Do You Know Your Stewardship is Working?

Like a ripple in a lake, the impact of good stewardship can spread wide, but understanding what's driving that impact requires looking beneath the surface.

The Stewardship Scorecard and Rubric ("the Scorecard") is a practical assessment tool created specifically for mission-based organizations. It provides a structured way to evaluate stewardship and fiduciary responsibilities while creating a shared understanding of strengths, gaps, and priorities across the organization.

Who should use the Scorecard?

The Scorecard is designed for stewards of mission-based organizations (e.g., nonprofit foundations and endowments): **boards, investment committees, executive leadership, and key staff.**

The Scorecard is a collaborative tool and most effective when incorporated into a facilitated discussion focused on strengthening stewardship and advancing mission.

How does the Scorecard work?

The Scorecard is designed to evaluate stewardship across five core areas central to mission-based organizations: **Organization, Fiduciary Governance, Investment Program, Accountability, and Programming.**

The Scorecard provides a structured framework that helps organizations:

- Assess stewardship and fiduciary effectiveness
- Identify strengths, gaps, and areas of misalignment
- Establish a common blueprint for strengthening governance and operations
- Reinforce that stewardship is a collective responsibility shared by leadership, board, and staff

How often should you evaluate stewardship?

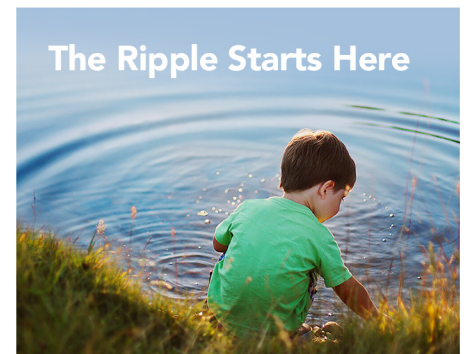
While stewardship is an ongoing responsibility, annual evaluation is recommended.

The Scorecard can be most effective when completed at the beginning or end of a fiscal year, during leadership transitions, or as part of strategic or financial planning. These moments provide a natural opportunity to reflect on current practices, identify areas for improvement, and set priorities for the year ahead.

Interested in a Stewardship Scorecard evaluation?

SouthCol Advisors can help guide the stewardship assessment process—interpreting results, aligning priorities, and translating insights into clear, actionable next steps.

To get started, request a copy of the Scorecard by contacting james.lumberg@southcoladvisors.com or jeanne.enright@southcoladvisors.com.



The Stewardship Scorecard is:

- A process that helps leadership teams (boards, investment committees, executives) evaluate strategic alignment
- A resource for staff to gauge understanding and highlight training or education needs
- A starting point for meaningful conversations about current and future stewardship

The Stewardship Scorecard is not:

- A solo activity—collaboration is essential
- A substitute for candid, honest dialogue
- A static, one-time "report card"