



## Broker Evaluation Scorecard

Organization: \_\_\_\_\_

Broker: \_\_\_\_\_

Selection Criteria	Priority	Score
Knowledge of Industry		
Knowledge of Account		
Account Team Qualifications		
Responsiveness		
Timeliness		
Credibility		
Commitment		
Claims Handling		
Accuracy		
Results		
<b>Total</b>		

### Directions:

1. Assign a priority rating for each criteria (1 most important and 10 least important).
2. Assign a score to each criterion (1 lowest to 10 at the highest score).
3. Add scores for total grade.

#### Grading:

- 75+ Exceeds exptectations
- 55–69 Meets expectations
- 54 or less Does not meet expectations

4. When analyzing scores consider the priority rating in evaluating the broker.



### Helping nonprofits benefit from risk

*Risk Management for Associations and Nonprofits*