

2013 COMMON REPORT



Each of the Charities Review Council's 2013 strategic goals and related indicators are stated below, with a brief narrative detailing progress made, key accomplishments, unanticipated results, and lessons learned.

GROWTH: Project locally, regionally and nationally the Council's distinctive voice for advancing the public's trust in charities, by strengthening the impact of our programs.

Indicators	Progress
4 Grantmaker Services partnerships established.	3 partnerships established, 1 delayed until January 2014
60 new nonprofits reviewed via Grantmaker Services partnerships.	78 new nonprofits reviewed
5 potential Grantmaker Services partners identified.	5 potential partners identified

Unanticipated results and key learnings:

We encountered many transitions in the last year, as a result of growth and need in the community. The fresh start brought about by an executive director transition, the formation of a new strategy team, and a move to a new, open-concept, collaborative office gave us renewed energy and inspiration to move our work forward in big ways.

Our capacity building programs are one way that we strengthened the independent sector to grow the philanthropic pie in the last year. We have partnered with funders that want to do more than just financially support nonprofits. Our innovative Grantmaker Services Nonprofit Strengthening Projects build the infrastructure of groups of charitable organizations in partnership with funders, leading to strong learning communities, stronger relationships and strengthened collective capacity. Last year, we formed partnerships with Greater Twin Cities United Way, Northside Achievement Zone, Youthprise, and hope to finalize the details of a collaboration with Otto Bremer Foundation in the coming weeks. These partnerships allowed us to reach hundreds of new nonprofits, 78 of which completed the Accountability Wizard review process. We engaged in promising conversations about collaborating with Rochester Area Funders Group, Morgan Family Foundation, Duluth Superior Area Funders Group, Nexus Community Partners, and Headwaters Foundation. We are eager to work together to strengthen even more nonprofits in 2014, as this work is truly helping to build more productive relationships between nonprofits, individual donors, and grantmakers.

DONOR: Stimulate charitable giving by motivating and educating donors to be smart givers.

Indicators	Progress
300 average monthly blog readers.	332 average monthly readers
3,250 Twitter followers	3,497 followers
Increase click rate of e-newsletter to 15% (from 13% in 2012).	18% click rate
350 Annual Forum attendees.	335 attendees

Unanticipated results and key learnings:

In the past, our work was really focused on being a watchdog of sorts for donors. Not so anymore. We've been working hard to build strong partnerships between donors and nonprofits with an asset-based model of service provision and capacity building. We've learned that the magic happens when donors and nonprofits share values and enjoy an authentic relationship. That's what we seek to build.

Through a robust social media presence, we have established ourselves as a national thought-leader. We are seen as experts on a wide variety of topics, but uniquely positioned to talk positively about the donor-nonprofit relationship. A series of blog posts we published last fall contributed to the national conversation on redefining the overhead ratio and were particular well-received. Due to our elevated visibility, the Laura and John Arnold Foundation reached out to us, along with national organizations Charity Navigator and Guidestar, inviting us to film a video about our services for their Giving Library. We've been able to use that video on our website to provide a unique visual presentation of our work.

Our 2013 Annual Forum event brought together 335 nonprofit, philanthropic, business, and government leaders to discuss what it means to "Dare to Fail on the Road to Discovery". Last year's event particularly focused on ways to engage the community through nationally-known keynote speaker Peter Sims, Community Leadership awards, entertainment by Youth Performance Company, and unique twitter feeds projected on the wall to showcase the real-time conversation happening online. Approximately 30% of guests were attending for the first time, allowing us to build new relationships and strengthening existing ones. The community feedback and dialogue that continued to take place long after the event has been very encouraging and inspiring as we build on those relationships and plan for the 2014 event.

NONPROFIT: Champion nonprofit accountability by identifying and defining sound practices and vigorously engaging the nonprofit sector in those practices.

Indicators	Progress
20 NEW (non-Grantmaker Services) Accountability Wizard participants.	32 NEW Accountability Wizard participants
90% renewal rate for Accountability Wizard participants.	86%

Unanticipated results and key learnings:

For the first time in 2013, we tracked reviewed nonprofits in two separate categories: those affiliated with the Grantmaker Services Nonprofit Strengthening Projects and those that are not. While the Grantmaker Services program is proving to be a remarkably successful way to partner with nonprofits, we continue to exceed our traditional nonprofit engagement goals, as well. We consider this an indication that our Accountability Standards, Accountability Wizard, and multitude of other resources continue to be highly relevant and valuable to nonprofits and donors alike. The renewal rate is a skewed indicator, as several organizations closed or merged with other, already reviewed nonprofits.

CULTURAL COMPETENCE: Transform the Council to a more culturally affirming, inclusive organization that will effectively serve donors and nonprofits of all cultures and communities.

Indicators	Progress
Co-host 3 diversity and inclusion (D&I) events in partnership with nonprofit allies.	6 events hosted
D&I assessment tool developed and launched.	Extensive D&I research, evaluation and community engagement completed.
Funding proposal for collaborative D&I work submitted by year end.	3 proposals submitted

Unanticipated results and key learnings:

We are pleased to have hosted six events related to diversity and inclusion in 2013 with ally organizations, Minnesota Council of Nonprofits, Side-by-Side Associates, Communities of Practice, and Twin Cities Daily Planet. The events centered around current D&I topics and included expert presentations and forward-thinking dialogue.

In implementing our first annual rolling review of the Accountability Standards, we conducted extensive research, evaluation and community engagement around the Diversity and Inclusion Standard. Multiple focus groups and community dialogues were held, in communities across Minnesota, to determine the needs of nonprofits and expectations of donors around cultural competence. Additionally, we submitted three grant proposals to foundation partners, requesting support to further our D&I work, including the development of an assessment tool. We learned that funders realize the value of this work, but there is great demand for D&I funding from a small pool of available resources. While our proposals were turned down, we received positive feedback and encouragement from funders, and we will continue to pursue funding for this exceedingly important work.

LEAD BY EXAMPLE: Earn public and nonprofit trust by modeling excellence in our recommended practices.

Indicators	Progress
80% average board meeting attendance.	83%
Establish annual assessment and review of Accountability Standards.	Completed

Unanticipated results and key learnings:

The Council wants to make sure that both nonprofits and donors have a strong voice in deciding what the Accountability Standards look like. We are committed to continuously improving and building shared agreement about which standards are important to the sector, and which standards indicate a truly strong organization. Last January, we launched a bi-annual rolling review of the Accountability Standards, where we planned to review 5-7 of the standards each year and present our revisions each January. We worked to engage all voices in the community, both supportive and critical, through surveys, focus groups, expert dialogue sessions, and committees to ensure that the revised Standards are widely accepted, co-created benchmarks.

Through this inaugural process, we learned that the research and engagement necessary to thoroughly consider each Standard and make thoughtful revisions takes much longer than we expected. We are currently assessing revised timeline options to ensure that the rolling revision is integrated into our annual workload in an effective and realistic way. It is our priority to ensure

that any revisions made to the Accountability Standards are done with careful consideration and robust community engagement. We are committed to doing this work well.

FINANCIAL STRENGTH: Ensure the Council’s viability through thoughtful revenue growth and responsible fund development from diverse philanthropic and earned income sources.

Indicators	Progress
\$80,000 from grantmaker partnerships/contracts	Raised \$105,000, released \$45,000.
\$57,656 Accountability Wizard fees (RENEWING)	\$51,890
\$7,860 Accountability Wizard fees (NEW, non-grantmaker services)	\$5,034

Unanticipated results and key learnings:

As we closed 2013, we made a strategic decision to invest in our technological infrastructure and strategic programs. To do so, we spent down some of our cash reserves and ended our year with a budgetary shortfall. Though we succeeded in forming strong grantmaker partnerships last year, some of those conversations were delayed until 2014 due to timing considerations. We feel strong and confident about our financial position moving into 2014.

Population Served:

The Charities Review Council served more than 8,500 individuals and 600 nonprofits in 2013. This community is served through our semi-annual newsletters, web services found at www.SmartGivers.org, monthly webinars and e-newsletters, social media sites including Facebook and Twitter (@SmartGivers), and telephone inquiries. We continue to be a leader in strengthening nonprofits’ capacity to carry out their missions by encouraging organizational transparency and accountability, achieved through the Accountability Wizard review process and Council staff assistance. We are continually developing our own organizational culture to reflect our values of inclusivity, and building a culturally affirming climate both internally and in our work with nonprofits and donors.

Attachment: Original budget Income/Expense statement



MOBILIZING INFORMED DONORS
AND ACCOUNTABLE NONPROFITS
FOR THE GREATER GOOD