

2014 COMMON REPORT



Each of Charities Review Council’s 2014 strategic goals and related indicators are stated below, with a brief narrative detailing progress made, key accomplishments, unanticipated results, and lessons learned.

Population Served:

Charities Review Council (the Council) mobilizes informed donors and accountable nonprofits for the greater good by creating the spaces, places and tools for donor-nonprofit engagement. Through cloud-based nonprofit technical assistance, responsive customer service, nonprofit learning communities, and donor education, we are building a culture of philanthropy where donors, funders and nonprofits are engaged partners, working together toward stronger communities. In 2014, we engaged 600 nonprofits via our online capacity building tool (the Accountability Wizard®), providing over 1,000 hours of customized technical assistance. Additionally, we sent 8,500 constituents our semiannual newsletter, and responded to 2,000 donor support calls (each call translates into a confident gift to a strong nonprofit organization!). We continued to provide extensive web based resources with over 27,500 individuals accessing our resources online at smartgivers.org and through social media platforms, including Facebook, Twitter and Instagram.

LEAD: Elevate impactful and inclusive giving strategies and practices.

Indicators	Progress	Comments
Expand Reach of Annual Forum	<p><i>363 Annual Forum attendees; 9% increase over the previous year</i></p> <p><i>Expanded event from a lunch keynote in 2013 to a full day event with 3 sessions in 2014</i></p> <p><i>800+ new ideas to re-imagine giving generated</i></p>	<p>Departing from the tradition of previous years, the Council hosted a newly expanded and highly experimental all day event. This was a transformative moment that sought to build creative conversations among donors, funders and nonprofits, creating a space to re-imagine philanthropy. The unique convening atmosphere allowed us to surpass our attendee goal. We were able to engage a new audience with over 75% participating for the first time.</p>
Diversify the fundraising tactics used by the nonprofit community	<p><i>Piloted 1 Live-Giving Event for Nonprofits and Donors:</i></p> <p><i>\$2,500 raised at the live-giving party in response to 5 nonprofit pitches</i></p> <p><i>18 nonprofits applied to be part of the party</i></p>	<p>Annual Forum attendees had the chance to practice innovation with our first ever live-giving event. The event was a resounding success; raising over \$2,500 with donations from 110 individuals.</p>

	<i>Developed customized 'pitch' workshop for nonprofits</i>	
90% of nonprofits committed to building donor trust	<i>91% met the Solicitation Practices Accountability Standard in 2014: 10% increase from 2013</i>	When nonprofits use the Soliciting Practices Accountability Standard as a guide, they demonstrate transparency and accountability, thus earning donors trust and elevating impactful giving strategies and practices. In 2014, we saw a 10% increase in the number of nonprofits under review meeting the Soliciting Practices Accountability Standard.

Unanticipated results and key learnings:

Annual Forum: With a new strategic plan the Council is focused on creating spaces, places and tools that elevate impactful giving strategies and practices. The Annual Forum 2014: Disruptive Philanthropy (Annual Forum 2014) included a design thinking session, a networking luncheon, and a live-giving event. Kicking off



the day with the design thinking session allowed participants to engage in meaningful conversations, which led to ideation throughout the day around our theme of Disruptive Philanthropy. Keynote speaker Michael Faye of Give Directly continued the conversation with his thought provoking message of innovation. The afternoon session was the experimental live-giving event. Through a nomination process, the Council selected the following 5 nonprofits to pitch at this event: Native American Community Development Institute, YouthLink, Rural Renewable Energy Alliance, World Savvy, and Pillsbury United Communities.

Our live-giving event borrowed a 'pitch' model from the technology industry, a sector famous for innovation and a willingness to fail. Together with our design team, Charities Review Council tweaked that model and applied it to the social sector's unique needs and strengths.

Building Donor Trust: Building on what we learned at Annual Forum 2014, donors are looking for new ways to give and opportunities to build stronger relationships with organizations that they trust. However, when inundated with solicitations, donors lose trust and struggle with making their giving decisions. The Council's 25 Accountability Standards®, such as the Soliciting Practices Accountability Standard, and accompanying Meets Standards® seal serve as a tool for relationship building between donors and nonprofits.



BUILD COMMUNITY: Increase the number of donors, nonprofits and stakeholders engaged in deep and meaningful relationships.

Indicators	Progress	Comments
Launch an ongoing series of dialogues between donors, nonprofits, and stakeholder allies	<i>#DisruptMN</i>	We launched an ongoing series of dialogues providing a space where donors, funders and nonprofits could meet to discuss new and creative philanthropic ideas.
Engage 82 organizations in Nonprofit Strengthening Projects	<i>Engaged 85</i>	We exceeded our goal by completing 3 Nonprofit Strengthening Projects that included 85 organizations.
Complete rolling review of Accountability Standards®	<i>Launched 25 Accountability Standards® on April 1, 2014</i>	Completed pilot year of the rolling review of the Accountability Standards® initiated in 2013.
Expand Nonprofit Saturation	<i>A 9% increase in new organizations from the previous year</i>	We aimed to encourage 34 new organizations to participate in the review process and were able to secure 35, which was a 9% increase from the previous year.

Unanticipated results and key learnings:

#DisruptMN: The Council is excited to lead the way into a new era of philanthropy where donors and nonprofits are engaged in authentic relationships. #DisruptMN (a hashtag on Twitter), which grew out of Annual Forum 2014, represents a space for creative conversation between donors, funders and nonprofits. Individuals nationwide continued the conversation after the Annual Forum, sharing their thoughts on inclusive giving practices and strategies with over 550 #DisruptMN tweets. Nationally, the hashtag was trending at #2 for 8 hours. Social media continues to be a space for relationship building between donors, funders and nonprofits.

Nonprofit Strengthening Projects: Nonprofit Strengthening Projects are an innovative program of Charities Review Council's Grantmaker Services. Council staff partner with grantmakers to accomplish their strategic interests for increasing the capacity of the organizations they fund. Through the Council's



Accountability Wizard® review process, customized workshops with subject matter experts, and individual consultation sessions, nonprofits have the opportunity to strengthen their infrastructure and increase their impact. In 2014, the Council partnered with the Otto Bremer Foundation, Youthprise, Greater Twin Cities United Way and Northside Achievement Zone, to build capacity among their grantees.

Standards Review: In 2013, to remain innovative, collaborative and forward thinking the Council piloted a rolling review of the Accountability Standards®. The review of the Accountability Standards® launched nonprofits and donors into a new era of governance, financial strength, impact, and partnership. In 2014, the Council successfully launched the newly revised Accountability Standards®, which represent the shared expectations between donors and nonprofits.

Expand Nonprofit Saturation: In 2014, the Council focused in on expanding its reach by enhancing nonprofit saturation. The Council’s success is attributed in part to 22 in person presentations given at key nonprofit convenings and media appearances, which allowed us to share our message of informed giving and nonprofit strengthening.

COLLABORATE: Work in partnership with stakeholder allies and develop capacity building services and products.

Indicators	Progress	Comments
Engage subject matter experts in Nonprofit Strengthening Projects	<i>18 subject matter experts engaged</i>	The Council successfully engaged 18 subject matter experts across our 4 Nonprofit Strengthening Projects.
Engage programing partners for expanded Annual Forum	<i>5 programing partners engaged</i>	The Council worked with 5 programming partners to help design and facilitate the full day’s events, including Pollen, GiveMN and Springboard for the Arts.
Identify diversity, equity, and inclusion cohort	<i>Secured funding in 2014 to launch project in 2015</i>	The Council collaborated with other nonprofit allies (including GiveMN, Minnesota Council of Nonprofits and Map for Nonprofits) to secure funding and launch learning equity cohort in 2015.
Acquire Funding for New Donor Capacity Building Tool	<i>Secured planning grant</i>	The Council secured funding to build an online tool for financial advisors and create a related sustainable business model for future efforts.

Unanticipated results and key learnings:

Partnerships: In 2014, we worked in partnership with stakeholder allies to enhance the Council’s programming. Through our Nonprofit Strengthening Projects we were able to engage subject matter experts in areas of nonprofit legal compliance, financial health, fundraising practices and governance, which benefited 71 organizations across Minnesota. In addition to the Nonprofit Strengthening Projects, we were able to engage 5 programming partners who helped us to redesign Annual Forum 2014 experience.



INNOVATE: Advance donor and nonprofit capacity for mission engagement.

Indicators	Progress	Comments
Launch new capacity building software	<i>Accountability Wizard® 3.0 successfully launched on April 1, 2014</i>	We made an investment in our online tool, Accountability Wizard® 3.0. With these improvements we saw a 16% increase in participant ratings of the user-friendliness of the software compared to its predecessor.
75% of nonprofits under review achieve the Diversity, Equity & Inclusion Accountability Standard	<i>81% achieved the Diversity, Equity & Inclusion Accountability Standard</i>	The revisions to the Diversity, Equity and Inclusion Standard (formerly Diversity and Inclusivity Standard) clarified its crucial role in building strong, trustworthy and accountable nonprofit organizations. We saw a 10% increase in organizations meeting this particular standard from the previous year.
80% of nonprofits indicate the Accountability Wizard® strengthened their organization’s internal practices	83%	83% felt that the Accountability Wizard® strengthened their organization’s internal practices and built organizational confidence.

Unanticipated results and key learnings:

Accountability Wizard® 3.0: In 2014, the Council improved its capacity building tools and technology. With the launch of this software we were able to more efficiently partner with nonprofit organizations, leading them to greater strength, efficacy and to the achievement of the Meets Standards® seal. With sustainability in mind, we restructured our enrollment fee from .01% to .02% of an organization's annual operating expenses, which allowed us to increase our capacity to serve more nonprofits. This software innovation and fee restructure allowed us to provide improved services and resources for each Accountability Standard® to our nonprofit partners. In 2014, 79% of organizations indicated that these improvements were helpful.

Accountability Standards®: The Accountability Standards®, which were updated along with the launch of Accountability Wizard® 3.0, are co-created benchmarks of nonprofit governance, finance, fundraising, and public communication.

