

2020 COMMON REPORT

In 2020, Charities Review Council (the Council) continued working to transform philanthropy by building donor and nonprofit relationships for strong, vibrant, and just communities. We are creating a culture of philanthropy where donors, funders, and nonprofits are engaged partners, working together toward stronger communities in Minnesota and beyond.

2020 presented unprecedented challenges for our nonprofit allies and the communities they serve. According to Independent Sector, 7% of nonprofits are estimated to close due to the pandemic and almost 1 million nonprofit jobs have been lost. More than 80% of nonprofits surveyed estimate revenues will be lower than expected in 2020. Nevertheless, we continue striving to meet our non-profit partners’ changing needs. Even as COVID-19 has changed so much about how we work and work together, we know what has not changed: when donors and nonprofits work together, we are able to meet the community’s needs and find innovative solutions to community concerns.

Population served

The Council serves both donors and nonprofits. In 2020, we served more than 700 nonprofits via the Accountability Wizard[®] (our online capacity-building tool) and the Diversity, Equity & Inclusion Toolkit, providing more than 2,400 hours of customized technical assistance along the way. Additionally, we sent 7,158 constituents our printed semiannual Smart Giver Newsletter and responded to more than 1,000 donor support calls and emails, each with the potential to lead to more confident gifts to strong nonprofits. We also continued sharing online resources with both donors and nonprofits on our website and social media platforms, including Facebook, Twitter, Instagram, and LinkedIn.



2020 strategic priorities and goals

Guided by our 2018–2021 strategic plan (available at smartgivers.org/about/strategicframework), we provided tools and gathering spaces for donors, funders, and nonprofits to come together in authentic and meaningful partnership. Due to the pandemic, we were unable to conduct many of our usual in-person trainings and social events and had to convert many of our activities to virtual formats. Despite these challenges, in 2020, we achieved the following in our five priority areas.



1. Expand our reach with donors, funders, and nonprofits

Indicator	Progress	Key Activities
Increase the number of donors using our list of Meets Standards [®] nonprofits by 8%.	7,158 recipients of our Smart Giver Newsletter (a 15.5% increase over 2019) and 47,919 unique pageviews of our online list (a 52.89% increase over 2020)	Through insightful content, engaged marketing, and cleaned mail and email lists, we exceeded our donor engagement goal. That means more people are consulting our resources before making gifts so they can be informed and educated around their philanthropy.

Indicator	Progress	Key Activities
Increase the number of nonprofit organizations reviewed by the Accountability Wizard® in 2020 by at least 8%.	24 new organizations compared to 32 budgeted. We were unable to secure the number of new organizations budgeted for the first time in six years.	Through continued outreach and the resources on our website, we enrolled 24 nonprofits. Social distancing requirements have limited conferences, workshops and other networking events. Ensuring positive learning experiences for nonprofits completing the review process resulted in word-of-mouth referrals that kept us close to our 2020 goal in a year of significant changes.
Increase the number of Diversity, Equity and Inclusion Toolkit subscriptions by 12%.	23 subscriptions compared to 27 budgeted, an increase of 187% from 2019.	23 subscriptions compared to 27 budgeted, an increase of 187% from 2019. We began offering DEI Toolkit overview webinar sessions. These proved to be very popular and resulted in increasing the maximum number of attendees allowed and enabled a waitlist.

Additional results and key learnings

Accountability Wizard®

In 2020, 53% of nonprofits in the Accountability Wizard® that Met Standards® indicated the review process helped position their organization to “better/more effectively work toward its mission” and 91% indicated it made their organization “more accountable and transparent.” We attribute this success to the continued development of our online resources and the care and support we give nonprofits as they undertake the review.

Our Nonprofit Services team regularly adds resources for our nonprofit partners to access during the Accountability Wizard® review process, including helpful links, key definitions, focused explanations, and sample policies. With this information, more than 47% of organizations self-identified a need in 2020 for changes related to governance before receiving the Council’s review results. Further, 75% indicated the review process increased their knowledge around governance once they met the Standards.

During this difficult period, the Council helped organizations focus on their own missions and outcomes by extending all upcoming Meets Standards® expiration dates. Janet Lindbo of Homes Within Reach commented: “Thank you so much for the extension. This will help us as we navigate through these challenging times! We value Charities Review accreditation.” The Council also filled gaps to provide “back office” guidance for nonprofits—for example, helping them manage internal control policies virtually—and collaborated with the Minnesota Council of Nonprofits, GiveMN, and others to help nonprofits explore new ways to manage governance, such as hosting virtual board meetings.

Diversity, Equity & Inclusion Toolkit

The death of George Floyd has also created new challenges and opportunities for local nonprofits—and for the Council as their ally. As nonprofits rise to the urgency of this moment, they are being asked to do much more, and to do it in new ways. We are supporting this increased interest with continued work in DEI and the resources that we are providing with the Toolkit, especially in the Greater MN/Western WI area. The Council built the Diversity, Equity & Inclusion Toolkit to address these issues, to provide an affordable, accessible, organizationally focused, action-oriented tool for nonprofits regardless of geographic location to assess, identify gaps and opportunities, and build their knowledge and strength around diversity, equity, and inclusion.

In 2020, 23 organizations subscribed to the Council’s DEI toolkit, an increase of 187% from 2019. We added new learning modules, updated the software, and launched two bi-weekly DEI Toolkit webinars, as we have been unable to meet in person with nonprofits wanting to advance their DEI efforts.

In addition to nonprofits, we have also received interest from other types of organizations who would like to use the Toolkit to enhance and guide their work and to address diversity, equity, and inclusion internally and in their communities. We are exploring opportunities to develop a social enterprise business plan that expands the Toolkit to serve civic, educational, and religious institutions.

FORUM

Based on positive feedback from FORUM 2019, we started to plan for a FORUM event in 2020 in Greater MN. Unfortunately, due to COVID, those plans were put on hold.

Instead, we’re continuing to move forward with our biennial event, with our next scheduled event taking place in the fall of 2021, which marks Charities Review Council’s 75th Anniversary. We look forward to planning a FORUM celebration that honors the long-standing history of our organization in the state and beyond.



2. Inspire and support culturally responsive giving

Indicator	Progress	Key Activities
Reference culturally specific philanthropy in at least 30% of communications.	35% on Facebook, 33% on Twitter, 40% on LinkedIn, and 55% in our email newsletters.	Throughout the year, we provided information about culturally specific philanthropy across all our communications.

Additional results and key learnings

New Ways of Connecting and Giving

Guided by our strategic plan and our commitment to diversity, equity, and inclusion, we continue to share information with donors about culturally specific philanthropy since information and resources on charitable giving is so often dominated by traditional models of philanthropy. We constantly strive to improve our services to be more inclusive of and accessible for nonprofits and donors of all backgrounds and experiences. We look forward to continuing these conversations and putting them into action in 2021.



3. Be recognized as a leader in advancing philanthropy

Indicator	Progress	Key Activities
Increase the click rate on Council communications.	Our 2020 email newsletter click rate was 5.29%, meeting our goal of 4%. 5.29% click rate is almost double the non-profit industry average according to Mailchimp. (2.79%)	By continuing to clean our email newsletter list and strengthening the messaging in our e-newsletters, we increased our click rate in 2020. Our open rate also rose (to 27%), reflecting greater engagement with our communications. Both outpace the nonprofit industry average for opens and clicks.

Indicator	Progress	Key Activities
Increase social media engagement.	<p>Twitter: Averaged 46.75 link clicks per month</p> <p>LinkedIn: 5.68% engagement rate</p> <p>Facebook: 62 new likes in 2020 (twice as many as 2019)</p>	2020 saw the Council have some of the highest engagement numbers of the year in November during our Give to the Max Day campaign. On Facebook, we averaged nine new followers every month.
Develop trainings and workshops centered around nonprofit governance, transparency, and diversity, equity, and inclusion and present to nonprofits at least 15 times across the state of Minnesota and the surrounding region.	Due to the COVID-19 pandemic, in-person presentations and trainings were not possible. We delivered virtual conference presentations across Minnesota, presented to two college classes studying nonprofit management (at Hamline University and Metropolitan State University), and hosted six webinars and two Facebook live events to talk smart giving with donors.	We developed two brand-new types of webinars, including a “Max Your Seal” webinar leading up to Give to the Max Day, and regular monthly Accountability Wizard® orientation webinars (four times).

Additional results and key learnings

Greater Online Engagement

The Council’s website and social media platforms continue to be a virtual space for our donor and nonprofit partners to engage and learn. We updated many of the existing resources on our website and blog while continuing to add new content.

With COVID-19 and social distancing, social media and digital communication were incredibly important this year. Our social media platforms were our primary way to engage with donors, nonprofits and funders when we couldn’t be together in-person. Our high engagement and click rates across platforms like Twitter and LinkedIn prove the importance and relevance of the content we’ve shared. We also found significant success on Mailchimp, for example, meeting or exceeding industry averages. We used this platform even more frequently during online giving campaigns, like Give-At-Home MN and Give to the Max Day.



4. Align internal structures and resources to meet external demands

Indicator	Progress	Key Activities
Establish long-term staffing plans	Our leadership succession plan was approved, and a three-year staffing model was created.	Staff collaborated over the course of the year to solidify plans for executive director succession, plot out a three-year staffing model, and more. These forward-thinking steps position the organization to anticipate and meet external demands in both the short and long term.

Additional results and key learnings

Diversity, Equity, and Inclusion within the Council

In 2019 and 2020, we used our own DEI Toolkit to assess our own diversity, equity, and inclusion, and uncovered areas where we both made progress and lost ground. Additionally, our Board of Directors dedicated two meetings (including an additional meeting) to explore if and how we perpetuate dominant culture and white supremacy, developing short-, mid- and long-term goals on how to address it. We have imbedded these insights into our annual plan, and they will inform our strategic planning in 2021. We will continue to discuss and implement changes to the Council’s operations to address systemic racism and our role in dismantling it.

Reducing Expenses

Since Shelter-in-Place orders began in March 2020, the Council has conducted all of our work remotely. We let the lease on our office space expire in November 2020, and moved to The Reserve, a co-working location. We have dedicated space (a 3-person suite) that allows us to save almost 40 percent on operating expenses.



5. Develop an organizational business model framed for growth

Indicator	Progress	Key Activities
Increase the average Accountability Wizard® review fee for new organizations.	Average Accountability Wizard® fee for new organizations was \$278.99, down slightly from \$286.21 in 2019.	To keep our resources accessible to nonprofits during the difficulties of 2020, we did not increase the average Accountability Wizard® fee for new organizations.

Additional results and key learnings

Average Accountability Wizard® Fee

Though we did not raise the fee for new organizations, we did not lose much ground, and we plan to raise it once we deem it appropriate to do so.

Changes we will make based on 2020 results

Diversity, Equity & Inclusion Toolkit

We are actively refining the DEI Toolkit based on nonprofit feedback. Additionally, we will be expanding our fee-for-service offerings in 2021 to include one-on-one consulting with organizations to (a) prepare to launch the work within their organization and (b) interpret the assessment findings together as they develop their goals. Although the Toolkit is designed for organizations to self-direct DEI work, many organizations report a need for more guided support, and we are continually exploring avenues to address this need. The Council is working to aggregate the data from Toolkit subscribers to help us ascertain what trends are being uncovered by the assessment tool. We will report on our findings and use them to inform our future improvements to the Toolkit and the additional learning modules. Subscribers will be able to use those tools to further advance their cultural fluency and responsiveness.