

# 2017 COMMON REPORT

In 2017, Charities Review Council (the Council) mobilized informed donors and accountable nonprofits for the greater good by creating the spaces, places, and tools for donor–nonprofit engagement. We are building a culture of philanthropy where donors, funders, and nonprofits are engaged partners, working together toward stronger communities in Minnesota and beyond. When donors and nonprofits work together in partnership, they are better able to meet the community’s needs and find innovative solutions to community concerns.

## Population served

The Council serves both donors and nonprofits. In 2017, we served more than 581 nonprofits via the Accountability Wizard® (our online capacity building tool) and the Diversity, Equity & Inclusion Toolkit, providing more than 1,400 hours of customized technical assistance along the way. Additionally, we sent over 7,325 constituents our semiannual Smart Giver Newsletter and responded to more than 1,200 donor support calls and emails (each one having the potential to translate into one or more confident gifts to strong nonprofits!). We also continued to provide extensive online resources to both donors and nonprofits on our website ([smartgivers.org](http://smartgivers.org)) and via our social media platforms, including Facebook, Twitter, Instagram, and LinkedIn. 252 donors, funders, and nonprofit leaders attended FORUM 2017: *Forging Trust*.



## 2017 goals and objectives

Guided by our strategic plan, we provided spaces, places, and tools for donors, funders, and nonprofits to come together in authentic and meaningful partnership. In 2017, we achieved the following through our three programs.

### 1. More nonprofits better positioned to meet their mission.

Indicator	Progress	Key Activities
161 nonprofits enrolled in the Accountability Wizard® for a review (revised from initial goal of 182 after reviewing more complete data in 2017)	170 nonprofits enrolled	Through outreach efforts including nonprofit calling days, in-person meetings, email notifications, and phone calls, we ended the year with 170 nonprofits enrolled, reaching 106% of our goal.
32 nonprofits enrolled in the Accountability Wizard® for the first time	47 nonprofits enrolled for the first time	Through outreach and marketing efforts, we enrolled 47 nonprofits that had not been reviewed before, reaching 147% of our initial goal and nearly achieving our stretch goal of 50.
80% of reviewed nonprofits indicate improved governance as a result of the Accountability Wizard® review process	Pre-submission, 54% of nonprofits indicated the review process helped them self-identify changes related to governance  In comparison, more than 80% of nonprofits needed to make governance-related changes to Meet Standards®	Many organizations are able to self-identify changes needed in order to strengthen their organization, however many underestimate the amount of change needed to Meet Standards®.

Indicator	Progress	Key Activities
	Upon review completion and meeting all Accountability Standards®, 86% of nonprofits indicated the review process increased their knowledge around governance	Nonprofits learn about governance and other topics in the Accountability Wizard® thanks to educational information, online resources, and communications with Council staff.
Launched the Diversity, Equity & Inclusion (DEI) Toolkit	DEI Toolkit launched	Through our work with our consultants doing research and design, our software developers creating the software, and nonprofit focus groups testing the software, we successfully launched the DEI Toolkit in May at FORUM 2017.
15 organizations purchased subscriptions to the Diversity, Equity & Inclusion Toolkit	20 subscriptions sold	Through outreach and marketing efforts including phone calls, in-person meetings, and online marketing, we sold 20 subscriptions to the DEI Toolkit, 133% of our goal.

## Unanticipated results and key learnings

### *Accountability Wizard®*

47 nonprofits enrolled in the Accountability Wizard® review process for the first time, far exceeding our initial goal of 32 and nearly reaching our stretch goal of 50. This was a 4% increase from 2016. Meanwhile, 93% of Meets Standards® organizations with 2017 expirations renewed their reviews, an increase over past years. We attribute this continual growth and success to our numerous in-person meetings, phone and email outreach, improved marketing efforts, and the strong reputation of our work, the Accountability Wizard® software, and the Meets Standards® Seal.



86% of nonprofits that Met Standards® indicated the review process helped position their organization to “better/more effectively work toward its mission”. Although we did not set a specific goal related to this metric, it represents a huge growth from 2016, when 63% indicated so. We attribute this success to our continued development of our online resources and our care and attention with the assistance we provide to nonprofits as they undertake the review.

Our Nonprofit Services team is regularly adding helpful 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

54% of organizations are able to self-identify a need for changes related to governance before receiving the Council’s review results. Further, 86% indicate the review process increased their knowledge around governance, which is an increase over 70% in 2016.

### *Diversity, Equity & Inclusion Toolkit*

We launched our brand-new Diversity, Equity & Inclusion (DEI) Toolkit at FORUM 2017 in May. The DEI Toolkit is an affordable, accessible, organization-focused set of tools and resources for learning, assessing, and developing an organization’s diversity, equity, and inclusion efforts. By the end of 2017, we sold 20 subscriptions, more than our goal of 15. We attribute this success to our continual marketing efforts and in-person meetings, as well as to the deep need for this kind of tool in the nonprofit sector. Since launching the DEI Toolkit, we have received much positive and constructive feedback from users, and we will continue development and improvement of the Toolkit in 2018.

## 2. Increased knowledge and awareness of Charities Review Council

Indicator	Progress	Key Activities
Launch brand new version of the <a href="http://smartgivers.org">smartgivers.org</a> website	New website launched	Through our work with a web developer, we successfully launched a brand-new website with greatly improved functionality (such as a stronger, faster nonprofit search and new “Donate Now” buttons) while establishing a modern, flexible, brand-aligned aesthetic that demonstrates trustworthiness.
Establish a baseline measure for number of unique pageviews of our resources for donors, nonprofits, and funders	Over 20,771 unique pageviews of online resources	With the launch of a brand-new website and more reliable analytics, we were able to determine a baseline measure of donors, nonprofits, and funders accessing our online resources. We can use this number to establish our goal for 2018.
Increase social media engagement over 2016 rates	<p><b>Twitter:</b> 7,076 followers; 6.2 engagements per day</p> <p><b>Facebook:</b> 1,329 likes; 10.2 engagements per day</p> <p><b>Instagram</b> 633 followers</p> <p><b>LinkedIn:</b> 337 followers; 1.6% engagement rate</p>	<p>In 2017, we saw a 14% increase in the number of followers across all social media platforms: Twitter by 12%, Facebook by 13%, Instagram by 29%, and LinkedIn by 23%.</p> <p>We saw a 41% increase in the number of engagements per day on Twitter. We also experimented with paid posts on Facebook and saw huge success, with paid posts averaging 39 engagements per post. We maintained a consistent engagement rate on LinkedIn, and we look forward to growing this audience in 2018.</p>
Increase Net Promoter Score by 3% over 2015	Net Promoter Score of 46, a 53% increase	After a very successful FORUM 2017, evaluation survey results indicated our Net Promoter Score increased from 30 in 2015 to 46, a more than 53% increase.

### Unanticipated 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. In 2017, we launched a brand-new website with greatly improved functionality, streamlined navigation, and an updated, unified, brand-aligned aesthetic. We continued sharing resources and research on our blog, which we integrated into our website for easier access, and we added new and updated resources to our website to better serve our donor and nonprofit partners. We added a powerful search function to our online list of Meets Standards® nonprofits, and we added a “Donate Now” button directly to each nonprofit’s profile, making it easier than ever for donors to find and support their favorite causes. We also now feature three new nonprofits on our homepage every day, helping to bring more visibility to the nonprofits that Meet Standards®. All of this strengthens the brand value of the Meets Standards® Seal, and likely has contributed to the increase in nonprofits enrolling and renewing their accounts in the Accountability Wizard®.



### 3. Increased number of donors and nonprofits engaged in deep and successful relationships

Indicator	Progress	Key Activities
Conduct a donor-specific survey evaluating the impact of the Meets Standards® Seal, the list of Meets Standards® nonprofits, and the relationship between donors and the nonprofits they support	Donor-specific evaluation survey conducted	Through our partnership with an evaluation consultant, we conducted a donor-specific survey that identified key priorities and gaps in our service, and greatly informed our strategic planning for 2018.

#### Unanticipated results and key learnings

##### *FORUM 2017: Forging Trust*

In May, FORUM 2017: *Forging Trust* created an engaging space to foster creative, active, and open conversations between donors, funders, and nonprofits around diversity, equity, and inclusion and how they contribute to building trust within the nonprofit and philanthropic sectors. We heard from an insightful panel of leaders discussing their own endeavors in this work and led deep conversations between Forum participants around how to move this work forward in their own organizations.

##### *Reasons for Undertaking the Accountability Wizard® Review Process*

From 2016–2017, 64% of nonprofits that Met Standards® indicated they undertook the review process “to better reach individual donors and funders”, because it was “requested by an individual donor”, or because it was “requested or required by a funder”. This shows the importance of the donor–nonprofit relationship in motivating nonprofits to undertake a review. Nonprofits see it as a good way to establish trust and transparency with donors and funders.



#### Changes that will be made based on the 2017 results

Guided by our achievements under our 2014–2017 strategic plan and the results from the donor-specific survey and other evaluations, the Council’s board of directors worked with a consultant to examine the Council’s purpose, envision what we want to accomplish in the future, and challenge ourselves to serve our community of donors, funders, and nonprofits even better. Through this rigorous planning process, the board articulated an ambitious new strategic plan with mission and vision statements that build on our past progress.

##### *Vision*

Transforming philanthropy.

##### *Mission*

Building donor and nonprofit relationships for strong, vibrant, and just communities.

##### *Strategic Priorities*



Expand our reach with donors, funders, and nonprofits.



Be recognized as a national leader in advancing philanthropy into the 21<sup>st</sup> century.



Inspire and support culturally responsive giving.



Develop an organizational business model framed for growth.



Align internal structures and resources to meet external demands.

To see our new 2018–2020 strategic framework, visit [smartgivers.org/about/strategicframework/](http://smartgivers.org/about/strategicframework/). To see our 2017 financials, visit [smartgivers.org/about/reports-financials/](http://smartgivers.org/about/reports-financials/).