

2019 COMMON REPORT

In 2019, 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. 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 2019, 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 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.



2019 strategic priorities and goals

Guided by our 2018–2021 strategic plan (available at smartgivers.org/about/strategicframework), we provided spaces, places, and tools for donors, funders, and nonprofits to come together in authentic and meaningful partnership. In 2019, 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 and 31,342 unique pageviews of our online list, representing a 15.5% increase.	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.
Increase the number of culturally specific nonprofits engaged in the Accountability Wizard [®] review process by 25%.	17% of organizations new to the Accountability Wizard [®] were culturally specific, while 24% of all nonprofits currently engaged in the review process are culturally specific.	Through targeted outreach efforts, we were able to engage several new nonprofits in the review process that identify as culturally specific and successfully re-engaged many more that otherwise would have expired in 2019.
At least 22 nonprofit organizations that have never been reviewed will enroll in the Accountability Wizard [®] in 2019.	43 new nonprofits enrolled for the first time.	As a result of the Council’s continual outreach efforts and the resources on our website, we enrolled 43 nonprofits that had not been reviewed before, reaching 195.45% of our goal.

Additional results and key learnings

Accountability Wizard®

80% of nonprofits in the Accountability Wizard® in 2019 that Met Standards® indicated the review process helped position their organization to “better/more effectively work toward its mission” (up from 79% in 2018), and 95% indicated it made their organization “more accountable and transparent.” We attribute this success to the continued development of our online resources and our care and attention with the 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 48% of organizations self-identified a need in 2019 for changes related to governance before receiving the Council’s review results. Further, 68% indicated the review process increased their knowledge around governance once they met the Standards. In partnership with the Council, more than 83% of our nonprofit partners made positive changes to strengthen their organization’s governance practices and policies.

Diversity, Equity & Inclusion Toolkit

While the Council had an ambitious goal of 31 DEI Toolkit subscriptions in 2019, we ended the year with eight organizations subscribing. This outcome was related to a shift in strategic focus that led our Engagement & Outreach Manager to prioritize Accountability Wizard renewals over DEI Toolkit sign-ups. Organizations that used the Toolkit in 2019 reported positive results.

Throughout the year we also gathered other constructive feedback from nonprofits using the tools, which have driven our plans to add new learning modules to the Toolkit in 2020.

FORUM 2019

FORUM 2019: *Breaking Patterns* took a close look at new approaches for the intersection of donor and nonprofit relationships. Uvinie Lubecki, founder and CEO of Leading Through Connection, focused our conversation on the necessity of mindfulness and compassion for how sector leaders bring new methods of connection into their work. We also heard from local leaders who are reframing the connections between nonprofits and donors in Minnesota, including Maria De La Cruz (Headwaters Foundation for Justice), Tuleah Palmer (Northwest Indian Community Development Center), and Damon Shoholm (James P. Shannon Leadership Institute).



2. Inspire and support culturally responsive giving

Indicator	Progress	Key Activities
Reference culturally specific philanthropy in at least 30% of communications.	21% on Facebook, 17% on Twitter, 23% on LinkedIn, 5% on Instagram, and 41% 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 commitment to diversity, equity, and inclusion, we set a goal around sharing information with donors about culturally specific philanthropy since information and resources on charitable giving is so often dominated by traditional models of philanthropy. With this being a new focus, this year served as an opportunity for us to learn what the right balance is for our community and set a baseline for moving forward.

We also had conversations with several culturally specific organizations to learn about how we can improve our services and increase their engagement with our work, as well as to explore potential collaborations between our organizations. 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 2020.

1 3. Be recognized as a leader in advancing philanthropy

Indicator	Progress	Key Activities
Increase the click rate on Council communications.	Our 2019 email newsletter click rate was 4.68%, meeting our goal of 4.5%.	By continuing to clean our email newsletter list and strengthening the messaging in our e-newsletters, we increased our click rate in 2019. Our open rate also rose (to 25%), reflecting greater engagement with our communications. Both outpace the nonprofit industry average for opens and clicks.
Increase social media engagement.	Twitter: 7.07 engagements per day LinkedIn: 5.56% engagement rate Facebook: 10.75 engagements per day, up from 8.44 in 2018	2019 saw the Council step up our engagement on Twitter by averaging 49 tweets a month. On LinkedIn, we relaunched our Charities Review Council alumni group, which currently has 65 active members.
Launch and share an updated version of the Accountability Standards®.	Launched updated Accountability Standards® on January 1, 2019.	Our updated Accountability Standards® were well-received in 2019, particularly the reframing of the standards in asset-based language for both nonprofits and donors. Throughout the year we shared and explained the new Standards on social media, on our blog, and through a new FAQ so that nonprofits, funders, and individual donors understood the changes.
During 2019, we will 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.	We delivered eight in-person conference presentations across Minnesota, presented to two college classes studying nonprofit management (at Hamline University and Metropolitan State University), and hosted six webinars throughout the year.	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). We also expanded our reach as a leader in advancing philanthropy by presenting at the Overcoming Racism Conference (in Bemidji), MCN Greater MN Conference (in Duluth), and Southwest MN Arts Council (in Marshall). More informally, we hosted our first New Year’s Happy Hour to bring together donors, funders, and nonprofits.

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, and we saw a total of 31,342 unique pageviews of these resources in 2019, representing a 15.5% increase over 2018.

Bringing on our first Engagement & Outreach Manager also helped position us as a leader in the field. The Engagement & Outreach Manager prioritized time in Greater Minnesota, helping the Council build deeper relationships across a broader area. We are excited to build on these relationships and provide better services across Greater Minnesota in 2020.



4. Align internal structures and resources to meet external demands

Indicator	Progress	Key Activities
Establish long-term staffing plans	Leadership succession plan approved, three-year staffing model created	Staff collaborated over the course of the year to firm up 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

Internal Improvements

Our goals and activities related to this strategic priority were mostly internal improvements to help the Council work more efficiently and effectively while meeting the sector’s needs and constantly improving our work. These internal steps included developing and approving a succession plan for staff leadership, building 18-month financial projections, establishing a three-year staffing model.

We also made technology improvements that streamlined our work, such as adding an online payment option for nonprofits signing up to use the Wizard, which has made the system far more efficient both for nonprofits and for Council staff.



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 \$290.65, up from \$179.99 in 2018	While in 2018 we focused on increasing our average fees overall, in 2019 we prioritized raising the average fees for nonprofits being reviewed for the first time.

Additional results and key learnings

Average Accountability Wizard® Fee

Through targeted outreach, we engaged a greater number of new large organizations, leading to a higher average fee. By increasing revenue from larger organizations, we are able to keep the review process affordable for smaller organizations.

Changes we will make based on 2019 results

FORUM Event Series

Based on feedback from past FORUM participants, we are planning a series of smaller conversations to bring donors and nonprofits together in new ways. To meet the needs expressed by past attendees for increased opportunity for cross-sector conversations and opportunities to create change and action, we are considering new approaches to FORUM, including hosting smaller, more focused FORUM events, and potentially hosting one in Greater Minnesota for the first time.

Diversity, Equity & Inclusion Toolkit

We will continue our successful DEI Toolkit blog series, with the third and fourth installments focusing on our assessment survey results and goal setting/action planning. As mentioned above, we also plan to add new learning modules in 2020 based on user feedback.