

2016 COMMON REPORT

Charities Review Council (the Council) mobilizes informed donors and accountable nonprofits for the greater good by creating spaces, places and tools for donor and nonprofit engagement. Through cloud-based 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.

Population Served

At Charities Review Council, we serve both donors and nonprofits. In 2016, we served more than 565 nonprofits via our online capacity building tool (the Accountability Wizard®), providing more than 1,200 hours of customized technical assistance along the way. Additionally, we sent nearly 7,000 constituents our semiannual Smart Giver Newsletter, and responded to more than 1,400 donor support calls (each call having the potential to translate into a confident gift to a strong nonprofit!). We also continued to provide extensive web-based resources at smartgivers.org and through our social media platforms, which include Facebook, Twitter, Instagram and LinkedIn.



2016 Goals and Objectives

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

1. More Nonprofits Better Positioned to Meet Mission

Indicator	Progress	Key Activities
206 nonprofits enroll in the Accountability Wizard® review process.	194 nonprofits enrolled.	Through outreach efforts including nonprofit calling days, in-person meetings and email notifications, we ended the year with 194 nonprofits enrolled, or 94% of our goal.
21 <i>new</i> nonprofits enroll in the Accountability Wizard® review process.	45 new nonprofits enrolled.	We attribute this success to our nonprofit calling days, which included cold calls on a quarterly basis, and the addition of a Nonprofits Strengthening Project.
75% of Accountability Wizard® participants (i.e. nonprofits) indicate their nonprofit is better positioned to meet mission.	63% indicated they were better positioned to meet their mission.	We added a new evaluation question in 2016 in order to establish a baseline for this measure.

Indicator	Progress	Key Activities
80% of Accountability Wizard® participants (i.e. nonprofits) indicate their participation improved governance.	Pre-Submission: 50% indicated the process helped them self-identify change related to governance.	Many organizations are able to self-identify changes that need to be made in order to strengthen their organization. However, many underestimate the amount of change that is needed in order to Meet Standards®.
	Post-Submission: 70% indicated the process increased their knowledge around governance.	By partnering with the Council through our online review process, 81% of participating nonprofits made positive changes to strengthen their governance practices and policies.
Nonprofit Strengthening Project participants indicate their time was better spent at a Council workshop, then at work.	100% agree, time was better spent at the Council workshops.	Strengthening Workshops were designed with participant ideas and feedback. Topics included fundraising, finance, governance and quality program assessment.

Unanticipated Results and Key Learnings

Nonprofit Engagement

With a goal of 21 new nonprofits engaged in the Accountability Wizard® review process, Charities Review Council not only met but exceeded its initial goal, engaging 45 new nonprofits. This was a 7% increase from 2015. We attribute this continual growth and success to our quarterly board and staff nonprofit calling days, numerous in-person meetings, and the addition of a Nonprofit Strengthening Project supporting Somali nonprofit leaders, funded by Youthprise. Our Nonprofit Strengthening Project was carefully designed with input from attendees. At the end of the workshop series, we asked, “*Was your time better spent at a Council workshop, then at work?*” 100% indicated “*Yes,*” that time was better spent with us learning new things. We were also able to reach 94% of our goal for total nonprofit enrolled in 2016, which was a great way to end the year. We look forward to serving even more nonprofits in 2017.

Accountability Wizard®

Charities Review Council added a new evaluation question in 2016, which asked, “*Did completing the Accountability Wizard® review process help position your organization to better/more effectively work toward its mission?*” With the results from this year, we found that 63% indicated they were better positioned to meet their mission. Having established a data-informed baseline, we are now able to set a goal for 2017.

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, and sample policies on every page. With this information, roughly 50% of nonprofit partners are able to self-identify a need for change before receiving the Council’s review results. 70% indicate that they learned something new about strong nonprofit governance. However, as outlined above, many underestimate the amount of change needed in order to align with widely accepted standards for nonprofit strength and accountability. In partnership with the Council, more than 81% of our nonprofit partners made positive changes to strengthen their organization’s governance practices and policies.

2. Increase Knowledge & Awareness of Charities Review Council

Indicator	Progress	Key Activities
7,000 page views of online nonprofit resources.	10,412 (unique) page views of nonprofit resource webpages.	We provide sample policies and links on our website to help organizations address action items, and ultimately Meet Standards®.
13,000 unique page views of charity search.	10,419 unique page views.	In 2016, we noticed an unexpected change in our Google analytics tracking, which we believe led to fewer page views. Additionally, we began the process of launching a new website to better serve our donor and nonprofit partners.
Increase social media engagement	Goal: 12.5 engagements per day Actual: 9.04 engagements per day	Increase social media engagement

Unanticipated Results and Key Learnings

Online Engagement

Charities Review Council’s website and social media platforms continue to be a virtual space for our donor and nonprofit partners to engage and learn. In 2016, we set aggressive goals around online engagement, and although we didn’t quite reach all of them, we definitely made improvements. At the beginning of 2016, we created a new communications report and plan to better track key metrics, such as social media engagement, total followers, and more. We plan to use this data as a baseline for generating goals in 2017. We also began sending bi-monthly e-newsletters with Council updates, recently reviewed nonprofits and sector news. In November, we began the process of launching a new website, with our donor and nonprofit partners in mind. Phase one of the new website launched in the first week of 2017, with an all new look, and search function capability, allowing donors to now easily search for their favorite nonprofit *or* cause. We’re also working on additional website features, including highlighting one Meets Standards® nonprofit every day. We look forward to launching the full website this spring!



3. Increase Number of Donors and Nonprofits Engaged in Deep and Successful Relationships

In 2016, we successfully secured funding to support an evaluation of donor-nonprofit relationships. In 2017, we’ll be using these funds to conduct a donor-specific survey evaluating the impact of the Meets Standards® Seal, and the relationships between donors and the nonprofits they support. We’ll use the results from this survey to inform our strategic planning process, taking place later this year.

Changes that will be made based on the 2016 results

2016 was a year of resilience for Charities Review Council. In December of 2015, after the 2016 budget and annual plan had been finalized, we received word that expected funding would not materialize. This funding equated to roughly 18% of our budget. As a small nonprofit, news like this required us to re-work our goals, plan, and strategies. Although our core work remained the same, our methods changed. In hopes of modeling transparent, authentic and engaged relationships between donors and nonprofits, we shared our journey openly in a 3-part blog series, which included the announcement of our updated staffing model. We creatively re-structured our organization with a mix of permanent staff, contractors, and consultants. In 2017, we plan to continue with this new model, engaging contractors and consultants as funding for projects is secured.

FORUM 2017

In 2016, we transitioned our once annual event to become an every other year occurrence. We are currently in the midst of planning our event, entitled FORUM 2017: *Forging Trust*. In collaboration with our event planning partner, Pollen, and our event co-host, The Bush Foundation, we're well on our way to creating a dynamic event and experience that pushes the conversation around Diversity, Equity and Inclusion forward.

Diversity, Equity, and Inclusion Toolkit

In 2015, 86% of our nonprofit partners needed to take action before meeting our Diversity, Equity, and Inclusion Accountability Standard®. In order to better support our partners in this area, we began working on a cost-effective and action-oriented toolkit to address equity gaps. The Diversity, Equity and Inclusion Toolkit is designed not only to help nonprofits meet this Accountability Standard®, but also to support growth in this area. In 2016 we completed phase one of this project, which was to create and test the tool with our nonprofit partners. We hosted 3 user-centered design sessions, involved more than 27 nonprofits in the prototyping and design process, and successfully secured funding from The Carlson Family Foundation, Wells Fargo, Medica Foundation, and Blue Cross Blue Shield, to continue with phase two of this work. Phase two includes developing action-based learning modules, and bringing the tool online for our nonprofit partners to use. We're in the midst of designing the online version, and look forward to launching the Toolkit at FORUM 2017 this spring.



Accountability Standards®

At the heart of our mission, the Accountability Standards® build shared agreement on promising practices, expectations and impact. In 2016, the Council began a review of the Accountability Standards® to ensure they emphasize the relationship between donors and nonprofits, use asset-building language, and propel our sector to greater strength and transparency. We look forward to launching the revised standards in 2017.

Ecosystem Grant

Charities Review Council was thrilled to be among the 39 organizations that received an Ecosystem Grant from The Bush Foundation. This grant will provide significant general operating support over the next two years. We plan to strategically invest these funds in updates to our technology (the Accountability Wizard® and our website), evaluation, and business modeling.

For more information on 2016 program activities, accomplishments and financials check out our 2016 Annual Report (coming soon) at smartgivers.org.