

**Charities Review Council
2006 Common Report**

Goals, Objectives and Activities

1. **Dramatically increase the number of nonprofit organizations about which the Council provides information.**
 - ***Fully implement the new system of conducting reviews—nonprofit online participation through the Accountability Wizard with Council verification.*** Implemented procedures to verify review responses from the increasing volume of nonprofit participants in a timely manner while ensuring the integrity and accuracy of the process. Developed policies regarding new and merged organizations, allowing more nonprofits the opportunity to participate in a review. Celebrated the one-year anniversary of the Accountability Wizard in December.
 - ***Add to the educational information available to Accountability Wizard participants.*** Provided technical assistance to Wizard participants to help them make changes, if needed, to meet standards (only four organizations didn't meet all standards by the time they completed the process, but approximately one-fourth didn't meet all standards when they began the process). Updated and improved educational components of the Wizard on an ongoing basis. Developed a resource nonprofits can use to determine whether they should be registered with regulatory agencies like the Attorney General outside of Minnesota.
 - ***Promote use of the Accountability Wizard to nonprofits soliciting in MN.*** Completed 23 presentations about the Wizard to nonprofit groups. Sent letter of invitation to MN Council of Nonprofits membership. Developed press release templates for reviewed organizations and tips for publicizing their participation in the Wizard as a demonstration of their commitment to accountability and transparency.
 - ***Partner with federated campaigns and community organizations to encourage nonprofits to participate in the Accountability Wizard.*** One of the 23 presentations noted above was sponsored by the Rochester Area Community Foundation. Forty-five representatives from 32 local nonprofits attended, resulting in nine organizations completing the Accountability Wizard and several others likely to do so in the near future. Central MN Community Foundation and Central MN United Way teamed to sponsor a presentation in St. Cloud; Duluth-Superior Community Foundation and Greater Duluth United Way sponsored a Duluth presentation. The Greater Twin Cities United Way's Council of Agency Executives made it their number one capacity building priority to promote participation in the Wizard to their 200 member agencies: 135 of those agencies have completed or are at some point in the review process. In addition, Community Health Charities is close to meeting its goal of all 27 member agencies participating in the Wizard by April 2007: 24 of those agencies have completed or are at some point in the review process to date.
 - ***Develop standards for federated campaigns and re-granting organizations.*** Pilot effort underway by two federated campaigns and one re-granting organization to determine whether current standards work for them or how they might need to be changed. Early results indicate that the process is useful for them and any changes would be minimal, if needed at all.

Indicators of successfully meeting objective

- *300 nonprofits enrolled in new process by year-end.*

Result: 249 nonprofits enrolled, 48 additional pre-enrolled, totaling 297 nonprofits involved in the Wizard by year-end.

- *80% of nonprofits completing the Accountability Wizard rate the process as useful in building organizational capacity to effectively carry out their mission.*

Result(to be confirmed): 81% indicated the Accountability Wizard improved organizational commitment to accountability; 84% indicated they would recommend the Wizard to other nonprofits.

2. Identify segments of donors who would use the Council's services to become more informed contributors, understand their needs and interests, and tailor products to serve them.

- **Assess current capabilities and features with respect to donor needs for ease of access and quality of information.** Conducted web site usability study to inform the development of new features noted below.
- **Develop new features accordingly that improve Council services to donors.** Unveiled the newly redesigned auto and goods donation page, just in time for year-end giving of household goods. The redesigned section features a searchable database of charities that accept donations of non-cash items such as clothing, appliances and automobiles. The public can also narrow searches by pick-up or drop-off availability and geographic location, such as Twin Cities metro area and outstate Minnesota. The charities listed have voluntarily participated in a review.
- **Promote Great Givers youth philanthropy curriculum to teachers and youth nonprofits throughout MN.** Integrated the Great Givers web site with www.smartgivers.org, to become a section of the Smart Givers Network. Here youth and young adults can find giving tips tailored for young people, read profiles of youth who are giving back to their communities and submit requests for free electronic or hard copies of full curriculum. Fulfilled 163 requests for curriculum.
- **Create avenues for input from donors on our standards, reviews and information services, including feasibility planning for an extensive outreach project to culturally diverse donors.** Developed goals, objectives and activities we will undertake in becoming a multicultural organization. Submitted proposals to funders for plan implementation in 2007.
- **Refine methods of gathering demographic information that better helps us understand who is using our services.** Worked with a technology vendor to develop features and capabilities for users of our web site to have personalized log-in pages, where they will provide demographic information and personal preferences to allow us to tailor our services to serve them better. This log-in feature will be implemented and launched in early 2007.

Indicators of successfully meeting objective

- *90% of surveyed donors using our services indicate the Council helped them make informed giving decisions.*

Results:

76 of the 78 (97.44%) respondents to our email survey who had used our printed charity list in 2006 indicated that the service helped them make informed giving decisions.

57 of the 59 (96.61%) respondents to our email survey who had used our online charity list in 2006 indicated that the service helped them make informed giving decisions.

75 of 84 (89.29%) respondents to our email survey indicated that they believe they have a good understanding of our standards and how meeting them demonstrates accountability in nonprofit organizations.

The following are among the many positive comments submitted by online survey participants:

“[SmartGivers.org] enables me to select charities that fully disclose the use of funding and donations received. I am better informed about giving decisions.”

“I give out your website to several people each year as a resource for their own giving.”

“If I am inclined toward a charity, I check it out. If it does not meet the CRC standards, then it goes off the list, but someone else gets the donation.”

- ❑ *90% of surveyed donors indicate the Council provides opportunity for feedback.*

Result: This indicator was omitted from the 2006 Informational Services Survey and will be measured at the end of 2007, after the implementation and launch of the personalized log-in function of the Web site.

- ❑ *Planning underway for involving diverse constituents in the Council's services.*

Result: First step was to add diversity to the board, which was accomplished with two new board members who are leaders in the Native American and African American communities. The full fledged Multicultural project begins in 2007.

3. Increase the numbers of donors who rely on the Council's services.

- ***Launch and promote Smart Givers Network website to the giving public.*** Mailed postcard to all constituents in February, promoting and inviting them to join the Smart Givers Network. Launched the premier issue of ***Smart Giving*** in December. This is the Council's free monthly e-newsletter for members of our Smart Givers Network, and is designed to highlight the latest charity review updates, news and ideas, and provide helpful giving tips.
- ***Carry out rebranding plan aimed at focusing public attention on the Smart Givers Network.*** Unveiled new newsletter design to solidify rebranding with constituents. Launched the giving season with the Council's first-ever smart giving holiday campaign. Conducted a multi-media public awareness campaign to help the public make informed giving choices during the holiday season. Responded to 45 media inquiries for information and comment.
- ***Support marketing efforts with newspaper editorial board visits.*** Completed three key editorial visits with the Star Tribune, Pioneer Press and Rochester Post-Bulletin. The Post-Bulletin followed up with an editorial urging local nonprofits to take advantage of the new Accountability Wizard.
- ***Promote Giving Guide to grantmakers as a grantmaking tool.*** In addition to Indicator results noted below, began planning for a partnership program with funders that would benefit them in their grant making and encourage greater accountability in their grantseekers.

Indicators of successfully meeting objective

- ❑ *50 % increase in website user sessions.*

Result: 41% increase.

- ❑ *Presentation and follow up contacts made to major Minnesota grantmakers informing them about our website, encouraging its use, and establishing a baseline assessment of their usage.*

Result: Presentations made to Grant Managers Network of MN Council on Foundations (and baseline survey taken) and to several key grant makers individually, including Otto Bremer Foundation, St. Paul Travelers Foundation, General Mills Foundation, Carlson Family Foundation, Best Buy Children's Foundation, Athwin Foundation. Several community foundations sponsored presentations for grantseekers in their areas: Central MN, Rochester Area, and Duluth-Superior community foundations.

4. Increase the organizational and financial capacity of the Council to advance its mission.

- ***Assess current strategic plan and begin new board-led strategic planning process.*** Please see Indicator results below.
- ***Strengthen Council board's engagement in strategic issues, relationship-building and resource development.*** The Council's Program and Financial Capacity Committees engaged the board well in these areas.
- ***Effectively strengthen Council resources through Accountability Wizard participation fees.*** Budgeted Wizard fee totals met.
- ***Develop committee of professional advisors that has nonprofit expertise and credibility.*** Initial contacts made for 2007 convening.
- ***Refine and enhance engagement of interns and volunteers.*** Expanded internship program by 50%. Welcomed several new highly skilled volunteers in areas of event sponsorships, planned giving and Accountability Wizard outreach and education.

- ***Celebrate the Council's 60th anniversary in a way that attracts and engages public attention.*** Secured highly regarded venue and well-known keynote speaker for Annual Forum to attract attention to the work and mission the Council has been pursuing for the last 60 years. Event theme was "Celebrating 60 Years: Honoring the Past, Serving the Future".

Indicators of successfully meeting objective

- *Completed data gathering for 2007 strategic planning.*

Result: Given the continued relevance and timeliness of our current strategic plan, the Board of Directors decided that proper organizational focus should be on implementation of the Accountability Wizard and Smart Givers Network in 2006, with strategic planning a major focus in 2007.

- *Budgeted revenue goal met with increased diversity of revenue stream.*

Result: Budgeted revenue of \$541,660 exceeded by \$9,000. Fee for service revenue increased from \$1155 (0.2%) to \$80,822 (14.7%) while other sources remained strong.

- *Professional advisory committee named; members participate in informational exchange meeting.*

Result: Deferred until 2007.

- *Four board meetings include a sector educational component.*

Result: Five board meetings included an educational component.

- *150 people attend 60th anniversary celebration at our Annual Forum.*

Result: 160 people attended the 60th anniversary Annual Forum.

POPULATION SERVED

The Council serves donors throughout Minnesota through publications (semi-annual *Smart Giver* newsletter is distributed to 18,000 individuals, nonprofits and businesses), responding to phone call and e-mail inquiries and our Web site, SmartGivers.org. We also provide educational services designed to help nonprofits striving to understand and meet our accountability standards.

KEY LEARNINGS AND CHANGES BASED ON RESULTS

The Accountability Wizard and Smart Givers Network have positioned us much better to serve donors and nonprofits. Board, staff and volunteers continually evaluate results of our work and input from stakeholders. We draw upon the input and lessons learned to revise our strategies and work plans in order to pursue most effectively the mission of the Council.

Based on our feasibility study in 2003-2004, we knew going into this year that nonprofits in Minnesota viewed favorably the idea of an educational online review process. We learned as the year went on that with so many priorities demanding staff attention at any given moment, nonprofits needed something to push Wizard participation to the top of their lists. Therefore, we will publicize further enrollment deadlines to be promoted in our communications vehicles and media campaigns. While the fee to participate in the Wizard is nominal to the organization (.0001% of the previous year's expenses), we also will seek out opportunities to partner with funders, providing discounts to organizations that enroll within a given period. We will proceed with the promotion of the Accountability Wizard to nonprofits, based upon these lessons learned regarding the most effective and constructive ways to reach them.

We also are drawing from the results and feedback learned this year in order to develop new features that will improve our services to donors through the Smart Givers Network. We have learned that the donor public needs a more user-friendly Web site, including the option of tailoring our services with a personalized view. We must be on the cutting-edge of technology to continue our relevancy with Internet savvy constituents, and we are developing a comprehensive public education plan informed by these findings.

SHARING RESULTS

We put nearly all our information on our website, and will include the results of recent evaluations.