This report represents Independent Sector’s responses to Charting Impact, a joint project of BBB Wise Giving Alliance, GuideStar USA Inc, and Independent Sector. Charting Impact uses five simple yet powerful questions to encourage strategic thinking and help organizations share concise information about their plans and progress toward impact.

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Mission:
To advance the common good by leading, strengthening, and mobilizing the nonprofit and philanthropic community.

The content of this Charting Impact Report is the sole product and responsibility of Independent Sector. This report does not in any way represent an endorsement from Independent Sector, BBB Wise Giving Alliance, or GuideStar, nor does it represent fulfillment of the BBB Wise Giving Alliance’s Standards for Charity Accountability. For more information on Charting Impact, visit www.guidestar.org/chartingimpact
1. What are we aiming to accomplish?

Independent Sector (IS) is a leadership network for nonprofits, foundations, corporate giving programs, and professional consultants committed to advancing the common good in America and around the world. IS accomplishes its mission by leading, strengthening, and mobilizing the nonprofit and philanthropic community in ways that create a stronger sector empowered to advance organizations’ charitable missions and address society's greatest needs. Our current, 2011-2014, strategic plan seeks to strengthen the sector in three areas: Voice: IS helps the nonprofit and philanthropic community shape public policies that enable organizations to serve the common good. Leadership: IS helps a world-class talent pool of diverse professionals expand their leadership competencies throughout their working lives and build a network of relationships that fosters innovative ways to advance the common good. Impact: IS helps nonprofits and foundations assess progress and communicate impact, with practices that support good governance and ethical choices.

2. What are our strategies for making this happen?

We leverage the strength, knowledge, and connections of our members and allies to engage and convene diverse leaders and broad networks at our premier national conference and throughout the year. We collaborate to identify opportunities, as well as problematic trends and challenges, and collaborate to develop fresh interventions and sound action plans. Our strategies include: Voice • Advancing public policies that maximize support for the work of nonprofit and philanthropic organizations including, but not limited to, incentives for charitable contributions and volunteerism. • Ensuring that changes to public policies regarding requirements for tax exemption strengthen the ability of all organizations to serve their charitable missions. • Increasing advocacy engagement so that public charities, social welfare organizations, and private foundations constitute a stronger voice as advocates of the common good. Leadership • Equipping an influential group of mid-career professionals aged 40 and under -- the NGen cohort -- with skills and networks to advance their work and achieve transformative impact. • Providing support to senior sector leaders through programming and networking opportunities. • Highlighting efforts to expand pipelines and communities that bring talented and diverse staff and board members into charitable sector organizations and strengthen leadership capacities across the sector. • Convening public and private forums in which leaders team with and learn from their peers. Impact • Collaborating with Alliance partners (GuideStar USA and BBB Wise Giving Alliance) to support the effective use of and promote the Charting Impact tool, within the new context of the GuideStar Exchange program, as an effective way to articulate and communicate impact. • Championing ethics and accountability in the sector by providing the knowledge, tools, and resources for nonprofit and philanthropic organizations to operate in alignment with the Principles of Good Governance and Ethical Practice. • Continuing to identify issues of pressing need to the sector around which to develop learning communities, programming, and support.

3. What are our organization's capabilities for doing this?

IS is a national organization that nurtures the deep partnership between philanthropic and charitable organizations of tremendous range and reach. Through such partnerships, IS is able to achieve the needed depth and breadth of perspective on the most critical societal and social issues. We have longstanding experience and success convening national, local, and global sector leaders in ways that facilitate state-of-the-art approaches, produce clear analyses of the toughest challenges facing the sector, and advance collective means to confront and transform them. IS seeks to bridge the wisdom and experience of the past with the most promising of innovations and a forward-facing stance to achieve new results. Whether in committee work or policy action networks, our participatory approach taps into the talents of members and nonmembers, grant-makers and grant-seekers, in ways that facilitate deep inquiry. By doing so, together, we reflect on issues from multiple perspectives and understand different organizations’ – sometimes competing – priorities to draw from the best practices and generate new options for tackling some of society's toughest challenges. IS has distinctive public policy expertise on an array of critical issues that affect the sector as a whole – from defining charity to reforming the tax code, and from charitable giving to charitable deductions – and that profoundly impacts the sector's ability to do its work. Our voice in public policy is...
respected, reliable, and timely. IS has: • Longstanding and vibrant relationships with ‘key influentials’ in Washington, D.C., around the country, and throughout the world. • Hundreds of active leadership volunteers who lead and carry out efforts toward our shared goals. This vibrant network of members and allies ensures that our programs and initiatives reach thousands of organizations. • A talented team of well-respected professionals in touch with the latest developments in the charitable sector and the infrastructure to communicate those developments sector-wide.

4. How will we know if we're making progress?

Voice • IS members and their affiliates work with IS and use IS materials to educate key government officials and the public about critical policy issues affecting the sector, with a demonstrated increase in the number of IS member organizations taking action on sector-wide issues. • Key decision-makers in Congress and the Administration ask IS for input on the development of policy proposals that could affect the charitable sector. • Via press interviews, meetings with government officials, and discussions across the nonprofit/philanthropic community, IS plays a critical role in conveying the sector’s value. • A range of media outlets reach out to IS for sound analysis of developing stories. Leadership • NGen convenings continue to attract age 40 and under diverse leaders vested in advancing so they are better prepared to fulfill the missions to which they have committed; increased interest in NGen Fellows program and NGen Leadership Award results in top line candidates applying for and participating in the program; participant evaluations report satisfaction at high levels; a strong NGen Fellows alumni network is established; and there is increased NGen engagement in overall IS priorities. • IS identifies strategies that will help overcome obstacles to attracting and retaining diverse nonprofit talent through collaboration with high-impact organizations and promising new strategies across sectors. • IS supports advancement of senior sector leaders through well-attended and robust participation in its conference, webinars, and other gatherings. Impact • IS actively promotes and supports Charting Impact as part of the GuideStar Exchange through a robust online resource center that allows participating organizations to continue to engage with the initiative. IS members are encouraged to complete a Charting Impact report. The IS website will host at least five new resources, created by IS, that increase the value proposition of Charting Impact and provide support for creating high-quality reports. • Nonprofits and foundations are supported in understanding and applying Principles of Good Governance and Ethical Practice. IS Resource Center includes enhanced content that reflects new thinking, if warranted, on governance practices. Web traffic demonstrates increasing use of resources. • Based on participant evaluations, the IS national conference is viewed as the premier leadership network convening for the nonprofit/philanthropic community, where ideas are explored in deep and thoughtful ways; content is delivered using innovative approaches; and relationships are built that yield opportunities for collaboration. Across all of our initiatives, we are considered an essential resource by our member community, as demonstrated by high new member and retention rates, and the willingness of members and allies to engage in our work and our network.

5. What have and haven't we accomplished so far?

Voice • IS maintained relationships with more than 120 Congressional offices in 2012 and continued to cultivate those relationships with 36 Hill visits so far in 2013. Key members of Congress asked IS to provide recommendations regarding potential changes to the tax code, including an invitation to testify regarding charitable giving issues. • We developed and promoted policy materials to IS membership for use in Hill meetings and lobby days that have been downloaded over 6,800 times. • We seek to strengthen relationships with key policy makers in the Administration at the staff level. • We continue to expand an active network of IS members who effectively work with IS to engage key national policy makers from their communities. • While we touch thousands through our membership, we see the opportunity to expand our base in concert with the growth and evolution of the sector, and in ways that include emerging leaders and new entrants to the sector, to ensure our voice is diverse and authentic. Leadership • IS hosts the sector’s premier national conference where nonprofit, philanthropic, and corporate giving leaders come together to learn from each other, tackle challenges, and draw inspiration that endures. Our recent conferences have enjoyed record attendance: over 800 attended in 2012, and about 150 participated in our Public Policy Action Institute. • We engaged hundreds of NGen leaders through 5 national NGen conferences and 5 cohorts of NGen Fellows. We created an annual NGen Leadership Award in 2010 that recognizes an
NGen leader with transformational impact. • We still seek to frame the most powerful means to sustain leadership across the sector, including a clear diagnosis of objectives and barriers toward a collective goal of recruitment and retention of top talent. Impact • Two years after launching Charting Impact, IS and Alliance partners BBB Wise and GuideStar USA decided to move in a different direction after the initiative was not utilized as expected. Starting in 2013, Charting Impact will continue as part of the GuideStar Exchange, with Independent Sector playing a supporting role. Initial data indicates increased participation and engagement with the initiative. • IS has distributed over 275,000 copies of the Principles of Good Governance and Ethical Practice, originally published by IS in 2007. We continue to promote and update the online Resource Center in order better to support nonprofits’ and foundations’ efforts to engage in effective practice. • While the Principles have been broadly disseminated, we have not captured how they are being used or how IS might build on these innovations. • We benefit from a rich and vibrant member community and work to enhance our engagement practices in order more effectively to model social network practices. • We continue to expand our communications efforts towards educating policy makers and other key influencers about the overall value and impact of the sector.