

ANNUAL REPORT 2020

putting our collective shoulder to the *wheel of change*



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about INDEPENDENT SECTOR

Independent Sector is the only national membership organization that brings together a diverse community of changemakers at nonprofits, foundations, and corporate giving programs working to strengthen civil society and ensure all people in the United States thrive. As the vital meeting ground, we advance our mission by fostering a sense of belonging, catalyzing action, and providing policy leadership across the full breadth of the charitable sector.

Our organizational strategies are results-centered and racial equity-focused. We believe that all charitable nonprofits and foundations in this country should be healthy and equitable to ensure that all people in the United States thrive, with targeted focus on Native, Black, Latinx, Asian, and other communities of color.

Our Focus



UNDERSTAND AND ACCELERATE THE IMPACT of the nonprofit sector



BUILD COMMUNITY by

creating an environment that flourishes and fosters the creation of powerful, meaningful, and lasting relationships



ADVOCATE FOR PUBLIC POLICIES that strengthen civil society

Message FROM OUR CHAIR AND PRESIDENT

In 2020, COVID-19 profoundly impacted every aspect of our lives, both personally and professionally, robbing us of well over a half-million family members, friends, and community members; causing massive financial disruption, work closures, and job loss; and forever changing our perspective on what we hold dear and consider truly important. The year also forced us to search our souls, as individuals and as a country, no longer able to turn a blind eye to the timeline of history that began more than 400 years ago, with tentacles of racial inequality and injustice that reach into every aspect of American life to this day. And all of this happened with the 2020 elections looming - among the most consequential elections for our sector and the nation in our lifetime - and an ongoing and everpressing environmental climate crisis.

The past year *almost* brought us to our knees – but it did not. Instead, it revealed an inner strength and determination as a people to begin the process of truly living the meaning of our nation's creed. As the only national membership organization that represents a diverse community of changemakers of all sizes and kinds. The trials of 2020 led Independent Sector to reevaluate our mission, rethink our focus, and redouble our efforts to **understand and accelerate the impact** of the nonprofit sector, **build community** as we work collaboratively with changemakers to lean into the magnitude of ambition and consequence that this extraordinary, historical time demands, and **advocate for public policies** to achieve the systems change needed to ensure all people thrive.

In March 2020, the pandemic triggered an immediate need to provide our members with information and resources as they struggled to maintain their operations, support their staffs, and continue to meet the needs of communities, also suffering the devastating impact of COVID-19. To do this, we established an online library of

curated COVID-19 resources focused on five key areas: communications, community impact, human resources, organizational sustainability, and public policy. We provided information on how to apply for federal nonprofit relief funds, teaming up with Washington Council Ernst & Young, a DC-based lobbying firm with deep expertise in the nonprofit sector, and Sheppard Mullin, a national full-service law firm with a dedicated nonprofit team, to develop an extensive online resource to navigate the CARES Act. We also armed members with information to help them use their voice to shape new COVID-19 relief legislation. Policymakers responded, making nonprofits eligible for key tax credits and billions in forgivable loans. IS then deployed resources, programming, and Al-technology to help nonprofits navigate these new programs, helping save 4.1 million nonprofit jobs.

With an eye toward accelerating impact, we collaborated with members and partners to create, curate, and disseminate knowledge to help organizations respond to challenges and opportunities, increase their effectiveness, and fulfill their missions. While COVID-19 challenged us to do this more rapidly, especially during the spring and summer of 2020, we also were able to focus on major bodies of work to help organizations manage their "new normal." These included the first annual report on the Health of the U.S. Nonprofit Sector, released in October, intended to serve not only as a data source, but also a critical engagement vehicle by which we can be in sustained conversation with our sector, and ultimately, policymakers about how to best improve the health of the charitable sector. Plans are underway with the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) to survey and convene sector leaders in conversations about the development of health benchmarks to be used as a health "baseline" against four pillars of health: financial resources, human capital, governance and leadership, and public policies and advocacy.

Limitations posed by COVID-19 forced us to be more creative about our community-building efforts, and more innovative about staying connected to our community. In January 2020, planning was well underway to hold the 2020 Upswell Summit in Pittsburgh. By the end of March, coronavirus had forced us to make a complete pivot, as we decided for safety reasons to hold our October 2020 Upswell Summit virtually – joined by more than 2,000 changemakers in all mission areas – and focused solely on COVID-19 recovery and antiracism. To ensure ongoing engagement with our members and the sector throughout 2020, we planned and held six virtual Upswell Pop-Ups leading up to the Summit – attended by nearly 3,000 changemakers – also focused on challenges associated with coronavirus and racial inequality. And, we held an additional special Pop-Up following the 2020 elections to analyze election results, recalibrate our minds and spirits, and investigate the opportunities and challenges before us as a sector.

On the **public policy front**, as COVID-19 continued to impact our organizational operations, through a collaborative effort, Independent Sector helped coordinate policy, advocacy, and communications efforts on behalf of our members and the sector. More than 177,000 changemakers used our CARES Act digital hub to find out how to access government relief funds, and more than 78,000 actions were taken in our Policy Action Center, exerting consistent pressure on Congress to provide support for the sector and our communities.

We leaned harder into our desire to take on a proactive, shaping role in the public policy space, creating the Nonprofit Infrastructure Investment Advocacy Group (NIIAG) in July 2020 to determine infrastructure investments needed to build a better future after COVID-19, and ensure systems were positioned to center on the needs of Black, Native, and other communities of color in the United States. We played a critical leadership role, along with other coalition members, to successfully advocate for the SBA to open up their relief programs to enable nonprofits to take advantage of billions of dollars in federal financial support. As a result, more than 180,000 nonprofits were able to access the Paycheck Protection Program (PPP), effectively saving 4.1 million nonprofit jobs.

IS Founder John W. Gardner said, "History never looks like history when you are living through it. It always looks confusing and messy, and it always feels uncomfortable." While certainly true, it's safe to say it's also an understatement, given all we endured last year. But it's also been said that the past is prologue, opening up new opportunities for our country to acknowledge where we have fallen short, and to do better, be better.

We sincerely thank the members, funders, partners, and community members across the country who joined us in putting their collective shoulder to the wheel of change and toward a new era of a measurably healthier and more just nation where all people can thrive.



Jeffrey L. Bradach Chair



Daniel J. Cardinali President and CEO

2020 *highlights*

March 2020

Independent Sector launched a series of online webinars and resources with a virtual town hall to discuss the sector's response to COVID-19 and the community's shared path forward through the life-altering pandemic.



April 2020

Curated, and made available sectorwide, a library of dynamic resources in the areas of communications, community impact, human resources, organizational sustainability, and public policy to provide nonprofit organizations with the information needed to continue advancing their missions during the pandemic.

Made the decision to move all Upswell programming virtual and launched Upswell Pop-Ups to bring the community together in smaller gatherings throughout the year. With seven Upswell Pop-Ups and the Summit in 2020, we engaged more than 5,700 changemakers from across the country around two major themes: COVID-19 recovery and antiracism.

03.19



June 2020

Announced the 2020 cohort of our American Express NGen Fellows program, designed to deepen their individual capabilities, expand their collective knowledge, and grow their professional networks. For the first time, the Fellows program format was fully virtual.

Submitted written testimony ahead of the Joint Economic Committee hearing on "Supporting Charitable Giving during the COVID-19 Crisis" in favor of expanding the universal charitable deduction.

Published *Trust in Civil Society*, which included new findings from the largest national survey of the American public on trust of nonprofit and philanthropic organizations.



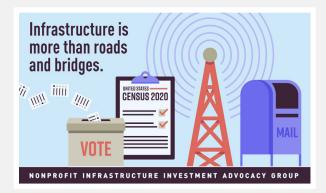
----- 02.19 -----

01.19

04.19 -

05.19 -

06.19



July 2020

Independent Sector and KABOOM! formed the **Nonprofit Infrastructure Investment Advocacy Group (NIIAG)** – a diverse coalition that has grown to about 50 organizations focused on identifying and advocating for the essential federal investments needed to rebuild the nation in the wake of the COVID-19 pandemic, economic crisis, and racial injustice reckoning of 2020.

With the Do Good Institute, Independent Sector announced the latest Value of a Volunteer Hour in 2020 was \$27.20 – up 7% from the previous year.

October 2020

Released first annual *Health of the U.S. Nonprofit Sector* report as data and critical engagement vehicle to promote sustained conversation with our sector and policymakers about how best to improve the health of charitable nonprofits.

Virtually gathered more than 2,000 for the 2020 Upswell Summit, to examine systems of racial injustice, consider the sweeping damage caused by the pandemic — and then collectively propose solutions that result in a better future where every person in America can thrive.

Announced Terence Lester, founder and executive director of Love Beyond Walls, as recipient of the 2020 American Express NGen Leadership Award.



Worked with partner Sheppard Mullin to provide nonprofit organizations reliable and timely information, and low-cost, direct counsel

to answer questions about the Executive Order on Combatting Race and Sex Stereotyping issued by the Trump Administration, which put future government contracts and grants at risk for organizations that provided DEI training for staff and centered racial equity in their missions.

November 2020

Held a special Upswell Pop-Up for changemakers following the 2020 elections to analyze election results, recalibrate our minds and spirits, and investigate the opportunities and challenges before us as a sector.

September 2020

Announced Fatima Goss Graves, president and CEO of the National Women's Law Center, as winner of the 2020 John W. Gardner Leadership Award.

09.19 -



December 2020

Initiated ongoing conversations with the Biden-Harris Transition Team to share recommendations on how the sector should best be represented in a new administration, the key civic infrastructure policies and investments that need priority attention, and where the sector needs the most help as result of the pandemic.



08.19

07.19

INDEPENDENT SECTOR by the numbers

15,000+ PEOPLE in IS events (including Upswell)

5,700 REGISTRANTS for all Upswell events

(up 200% from 2019)

2,000+

REGISTERED for the Upswell Summit (up 69% over 2019)

3,700+ <u>REGISTERED for the Pop-Up series</u>

78%

OF SPEAKERS were Black, Native, Latinx, Asian, or other person of color

92%

REPORTED that they received useful information about anti-racism

85%

REPORTED they felt a sense of community with other Upswell community members

500 IS MEMBER ORGANIZATIONS

55,030 FOLLOWS on our social media channels

784,886

UNIQUE PAGEVIEWS for the IS and Upswell websites

806,983 social media impressions in 2020

financials

CONSOLIDATED STATEMENT OF FINANCIAL POSITION December 31, 2020 (With Comparative Totals for 2019)

| | | 2019 | | |
|---|--------|------------|----|------------|
| Assets | | | | |
| Cash | \$ | 8,710,937 | \$ | 3,127,379 |
| Investments | | 10,366,760 | | 9,443,846 |
| Accounts and other receivables | | 31,928 | | 224,528 |
| Grants receivable and promises to give, net | | 1,778,961 | | 670,319 |
| Prepaid expenses and other assets | | 101,500 | | 147,974 |
| Deferred compensation plan assets | | 134,763 | | 92,586 |
| Deferred rent receivable | | 215,960 | | 251,820 |
| Deferred lease incentives | | 130,365 | | 164,431 |
| Leasing commission costs, net | | 89,254 | | 118,156 |
| Property and equipment, net | | 24,445,210 | | 25,353,844 |
| Total assets | \$ | 46,005,638 | \$ | 39,594,883 |
| Liabilities and Net Assets | | | | |
| Liabilities: | | | | |
| Accounts payable and accrued expenses | \$ | 683,479 | \$ | 1,307,152 |
| Deferred rent liability | | 3,520 | | 2,966 |
| Refundable advance | | 841,995 | | - |
| Deferred compensation plan liability | | 134,763 | | 92,586 |
| Notes payable | | 8,845,174 | | 10,088,867 |
| Deposits held in escrow | 91,234 | | | 133,348 |
| Total liabilities | | 10,600,165 | | 11,624,919 |
| Net assets: | | | | |
| Without donor restrictions: | | | | |
| Undesignated | | 23,950,105 | | 18,621,260 |
| Board designated | | 8,346,107 | | 7,722,558 |
| | | 32,296,212 | | 26,343,818 |
| With donor restrictions | | 3,109,261 | | 1,626,146 |
| Total net assets | | 35,405,473 | | 27,969,964 |
| Total liabilities and net assets | \$ | 46,005,638 | \$ | 39,594,883 |

CONSOLIDATED STATEMENT OF ACTIVITIES Year Ended December 31, 2020 (With Comparative Totals for 2019)

| | 2020 | | | 2019 | |
|--|-------------------------------|----------------------------|---------------|---------------|--|
| | Without Donor Restrictions | With Donor Restrictions | Total | Total | |
| Revenue and support | | | | | |
| Grants and contributions | \$ 10,040,612 | \$ 3,451,965 | \$ 13,492,577 | \$ 6,012,230 | |
| Membership contributions | 1,598,430 | _ | 1,598,430 | 1,656,663 | |
| Rental income | 1,125,792 | _ | 1,125,792 | 1,209,782 | |
| Conference fees | 90,136 | _ | 90,136 | 519,384 | |
| Investment return designated for current operations | 316,000 | _ | 316,000 | 293,000 | |
| Publication sales and other | 81,014 | _ | 81,014 | 84,660 | |
| Net assets released from restrictions: | , | | - , | , | |
| Satisfaction of program restrictions | 533,226 | (533,226) | _ | _ | |
| Satisfaction of time restrictions | 1,435,624 | (1,435,624) | _ | _ | |
| Total revenue and support | 15,220,834 | (1,483,115) | 16,703,949 | 9,775,719 | |
| Expenses | | | | | |
| Program services: | | | | | |
| Public policy and community engagement | 1,784,854 | _ | 1,784,854 | 1,622,403 | |
| Planning and learning | 108,518 | _ | 108,518 | 190,161 | |
| National conference | 1,719,661 | _ | 1,719,661 | 2,753,185 | |
| Programs and practice | 755,163 | _ | 755,163 | 1,191,208 | |
| Communications and marketing | 1,339,599 | _ | 1,339,599 | 1,048,068 | |
| Networks and member engagement | 125,969 | _ | 125,969 | 160,373 | |
| Total program services | 5,833,764 | _ | 5,833,764 | 6,965,398 | |
| Supporting services: | | | | | |
| Fundraising | 805,673 | _ | 805,673 | 749,374 | |
| Membership development | 82,549 | _ | 82,549 | 99,575 | |
| General and administrative | 1,637,802 | _ | 1,637,802 | 1,387,376 | |
| Strategic visioning | 153,244 | _ | 153,244 | 173,292 | |
| Total supporting services | 2,679,268 | _ | 2,679,268 | 2,409,617 | |
| Building services: | | | | | |
| Tenant operations | 917,763 | _ | 917,763 | 1,030,649 | |
| Building operations | 452,033 | _ | 452,033 | 507,633 | |
| Total building services | 1,369,796 | | 1,369,796 | 1,538,282 | |
| Total expenses | 9,882,828 | _ | 9,882,828 | 10,913,297 | |
| Change in net assets before investment (loss) return | 5,338,006 | 1,483,115 | 6,821,121 | (1,137,578) | |
| Investment (loss) return in excess of amounts for current operations | 614,388 | | 614,388 | 1,070,724 | |
| Change in net assets | 5,952,394 | 1,483,115 | 7,435,509 | (66,854) | |
| Net assets | | | | | |
| Beginning | 26,343,818 | 1,626,146 | 27,969,964 | 28,036,818 | |
| Ending | \$ 32,296,212 | \$ 3,109,261 | \$ 35,405,473 | \$ 27,969,964 | |

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Center for Nonprofit Excellence Center for Transforming Mission Dominican Republic Center for Transforming Mission Kenya Center on Community Philanthropy, Clinton School of Public Service, University of Arkansas Center on Nonprofits, Philanthropy, and Social Enterprise, George Mason University Champions in Service of San Fernando Valley and Greater LA, Leadership Foundation of Los Angeles **Charity Navigator** Charles and Lynn Schusterman Family Foundation Charles F. Kettering Foundation Charles Stewart Mott Foundation Charleston Leadership Foundation Children's Aid Child Trends Church Communities Foundation. Inc. City Year, Inc. Coalición Legal para PR -Legal Coalition for PR Code Nation Code the Dream Cognitive Toybox Inc **Collective Liberty** College Forward **College Futures Foundation** College Possible Colorado Nonprofit Association Commit2Dallas CommonGood Vermont Communities Foundation of Texas Communities In Schools Communities In Schools of Mid America, Inc. **Community Action Partnership** Community Foundation for Southeast Michigan **Community Partners Community Resource Center** Community Wealth Partners Conflict Resolution Services, Inc.

Congregación León de Judá, Leadership Foundation of Boston Congressional Hispanic Caucus Institute **Connect Detroit** COSMA Coalition of State Museum Associations Council for Advancement and Support of Education Council of Chief State School Officers **Council of Michigan Foundations Council on Foundations** Cristo Rey Dallas High School Inc. Dallas Afterschool **Dallas Leadership Foundation** Dallas Zoological Society Dance/USA Deloitte LLP Des Moines Leadership Foundation: **Pillars of Promise Detroit Zoological Society** Distributive Education Clubs of America Do Good Institute **Donors Choose** Doris Duke Charitable Foundation Dorothy A. Johnson Center for Philanthropy, Grand Valley State University **Dyson Foundation** Edna McConnell Clark Foundation El Pomar Foundation Elevate **Emily Davis Consulting Empire Health Foundation** Encore.org Eugene and Agnes E. Meyer Foundation Ewing Marion Kauffman Foundation Fair Chance Family Gateway Family Reunion FFWD First Coast Leadership Foundation: First Coast Christian Outreach First Nations Development Institute First Peoples Fund Florida Association of Nonprofit Organizations Florida Cultural Alliance Florida Nonprofit Alliance Florida Philanthropic Network Fordham University Forefront Foundation for a Healthy St. Petersburg Foundation for the Mid South Friends of the Children **FUSE** Corps Games for Change

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Paul Quinn College PayPal Inc. **PBS** Foundation Per Scholas, Inc. Performing Arts Alliance Perlman & Perlman Peter G. Peterson Foundation Philadelphia Bar Foundation Philadelphia Leadership Foundation Philanthropy for Active Civic Engagement Philanthropy Southwest Philanthropy WV Pittsburgh Leadership Foundation **Playworks Education Energized** Plenty PolicyLink Portland Leadership Foundation Program on Philanthropy and Social Innovation (PSI) - The Aspen Institute ProInspire Project GRAD Houston **Prosperity Now** Proyecto Pastoral Raheem **Raikes Foundation Rainwater Foundation Reality Changers** Reel Stories Teen Filmmaking Inc Regents of the University of California Reinvigorating the Conversation: Volunteerism, Service-Learning and **Community Engagement Religions for Peace USA** Research-Aid Networks Roadtrip Nation LTD Rockefeller Brothers Fund **Rockefeller Foundation RSVP** Volunteers in Service Running Strong for American Indian Youth Salem Leadership Foundation Salish Kootenai College Foundation Sall Family Foundation Savannah Leadership Foundation School of Professional Studies, Columbia University Scratch Foundation Seattle Foundation SER Jobs for Progress National, Inc. SETDA Share Our Strength Sidekick Education Inc Skillman Foundation **Skoll Foundation** Society for Nonprofits South Texas College

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