

# RISING TO THE CHALLENGE

ANNUAL REPORT 2021

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# **ABOUT** INDEPENDENT SECTOR

Independent Sector is the only national membership organization that brings together a diverse community of changemakers, nonprofits, foundations, and corporations 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 resultscentered and racial equity-focused. We believe the country's charitable nonprofits and foundations should be healthy and equitable, and have a targeted focus on Native, Black, Latinx, Asian, and other communities of color.

# **OUR** STRATEGIC DRIVERS



# COMMUNITY BUILDING

We build community among changemakers who work and volunteer in the social sector in order to focus on wellness, build trust, bridge divides toward belonging, and create this healthy and racially just society to ensure all people thrive.



We create and share knowledge and research to both understand and accelerate the impact of the nonprofit sector. By assessing the health of the nonprofit and philanthropic sector as a whole, we can map out a clearer path toward driving more health and equity in our communities.



We advocate for public policies that strengthen nonprofits, foundations, and diverse communities nationwide – and help social sector organizations fulfill missions. We serve as a unified voice and information source on pressing legislative and economic issues in our sector.

# MESSAGE

# FROM OUR CHAIR AND PRESIDENT

While the unimaginable challenges that confronted our sector in 2020 persisted in 2021 - impacting our communities and operations - Independent Sector members, supporters, and partners continued to stand in the gap - rising to the challenge to lead and follow through on missions to help heal and support the recovery of our communities, our organizations, and ourselves as leaders.

Experiencing an ever-growing demand for services - despite a decline in revenue and the loss of nearly one million jobs - our organizations remained dogged about serving the public good, providing essential services through often heroic acts when our communities needed us most.

Millions of healthcare workers risked their lives to care for COVID-19 patients. Organizations reached into their reserves to enable food bank operations to continue and eldercare services to remain available. Nonprofits maintained and provided essential services to youth and their families. These are just a few examples of the selfless contributions made by thousands that we are proud to call Independent Sector members.

Holding firm to our commitments to serve our community during the pandemic -- or whenever disasters strike - Independent Sector remained focused on continuing to accelerate sector health to support and help transform organizations and leaders to build a healthy and equitable social sector; **build community** because we know we can do better when doing good together; and advocate for policy change necessary to build healthy and equitable communities where all people can thrive.

Advancing our work to accelerate sector health, Independent Sector and Edelman Data & Intelligence partnered to release in July 2021 our second annual "Trust in Civil Society" report of survey findings, which explored the nuances of trust in American nonprofit and philanthropic organizations. In October 2021, we released our second annual "Health of the U.S. Nonprofit Sector" report, an evolving

resource that collects the most current data on the health of the U.S. nonprofit sector across multiple dimensions in a single, accessible format. This report includes original research from Independent Sector, specifically analysis of federal data about the nonprofit sector's economic impact and demographic composition. It also includes other data sourced from a wide range of existing research on nonprofit institutions.

Building and sustaining community is the transformational power at the heart of all we do to create a healthy and racially equitable nation. Despite the challenges posed by COVID-19, we were able to maintain and deepen our connection with changemakers nationwide, engaging more than 3,000 through our Upswell Pop-Ups, Upswell Exchanges, and the 2021 Upswell Summit.

In October alone, Independent Sector virtually convened more than 1,100 changemakers from across the nation for the 2021 Upswell Summit to focus on our collective mission to build a healthy and racially just sector and nation. During the Summit, we presented the John W. Gardner Leadership Award to nationally recognized leaders Dr. Gail C. Christopher and Professor john a. powell in recognition of their transformative work to build a better civil society.

Continuing our efforts to strengthen individual and collective leadership capacity and support emerging leaders, in 2021, we engaged 28 Fellows through the Upswell Fellows program and the American Express NGen Fellows program - growing their personal and professional networks and addressing the adaptive nature of leading in these uncertain times. As part of our Fellows program, Independent Sector also partnered with The Chronicle of Philanthropy to elevate the work and innovation of Upswell Fellows during the year. At least 75% of these Fellows are Black, Native, or other people of color working in or with the nonprofit sector.

We also continued to play a key leadership role in the public policy space as a national, sector-spanning infrastructure organization with the capacity to advance federal policies that impact the sector and our service to communities. Remaining in the grip of the pandemic during 2021, we collaborated with the new Administration and Congress to continue providing meaningful relief to our sector, most notably by expanding access to the Paycheck Protection Program for nonprofits and saving millions of jobs, and successfully urging the Administration not to put forward previous campaign proposals that would eliminate billions of dollars in annual giving.

To deepen the partnership between the nonprofit sector and federal government, in 2021, Independent Sector created, through a proposed executive order and draft legislation, our "Seat at the Table" initiative. It seeks to create permanent, structural mechanisms for the sector to help shape and improve federal policy, while also expanding opportunities for the government to work more effectively with the sector to achieve shared goals. As a result of the foundation laid in 2021, Representative Betty McCollum (D-MN) and Representative Fred Upton (R-MI) eventually introduced the Nonprofit Sector Strength and Partnership Act in April 2022.

Co-founded by Independent Sector and KABOOM!, our Nonprofit Infrastructure Investment Advocacy **Group** (NIIAG) entered its second year of engaging our diverse group of community leaders from across the charitable nonprofit sector to identify and advocate for the essential federal investments needed to rebuild the nation in the wake of the pandemic, the economic crisis, and racial injustice and inequity. The coalition, 70 organizations strong, notched significant victories in the American Rescue Plan Act and the Infrastructure Investment and Jobs Act, while also mobilizing around the ongoing Build Back Better debate.

Independent Sector consulted with experts to develop a policy analysis process to determine to what extent sector policy proposals closed or exacerbated inequities across donors, nonprofits, and communities. The process was used to analyze and educate the sector about a wide range of issues, particularly the Accelerating Charitable Efforts (ACE) Act. Resources and lessons from this process have been shared with other nonprofits to help their efforts to formally analyze their own policy issues through an equity lens. Independent Sector also hosted a series of highly-rated trainings in 2021 that enable nonprofit policy experts to discuss best practices and troubleshoot challenges when it comes to integrating equity into their policy and advocacy work.

None of what we accomplished could have been done without the deep commitment and partnership of our members and larger changemaker community. We are stronger because you are a part of this group of leaders and organizations who understand that there is benefit to looking beyond our own individual missions toward what binds us - our collective aim of a healthy and equitable nation where all people thrive. As we proceed toward the future, we will undoubtedly continue to face existential challenges, but this organization and its leaders stand ready to help lead our community through it all - understanding that there is a healthy and just world available to us if we are committed to building it.



Fred Blackwell Chair



Daniel J. Cardinali President and CEO

# HIGHLIGHTS

# AND ACCOMPLISHMENTS

# February 2021

With KABOOM!, led the Nonprofit Infrastructure Investment Advocacy Group (NIIAG) – a coalition of 70 organizations – in supporting provisions in the **American Rescue Plan Act of 2021** that would have bolstered community and civic structures that ensure all communities across America – especially Black, Indigenous, and other people of color who have been disproportionately affected by the COVID-19 pandemic – can rebuild, engage, and thrive.

# **June 2021**

Announced the 2021 nonprofit and philanthropic cohort of the American Express NGen Fellows program, part of the American Express Leadership Academy, offering a transformative opportunity for changemakers age 40 and under to strengthen their leadership capacity, hone their change-making skills, and build connections with some of the social sector's most influential leaders.

# **May 2021**

Introduced the **Upswell Exchange**, providing a more intimate space for Pop-Up participants to share their thoughts on topics discussed during Pop-Ups and help generate solutions and relationships necessary to build trust for wholistic and equitable change.





# **April 2021**

- With the University of Maryland's Do Good Institute, announced that the latest value of a volunteer hour in 2021 was \$28.54 - up 4.9% from 2020.
- Launched new monthly newsletter, ChangeWorks, featuring the missions of various IS members and sharing their powerful and inspiring stories on their work to build healthy and equitable communities.

01.21 ----- 02.21 ----- 03.21 ----- 04.21 ----- 05.21 ----- 06.2

# **July 2021**

In partnership with
Edelman Data &
Intelligence, released our
second annual "Trust in

**Civil Society"** report on survey findings, which showed that while trust across all institutions is declining, a majority of Americans remain confident in the ability of the nonprofit and philanthropic sector to strengthen U.S. society.

# October 2021

 Released our second annual "Health of the U.S. Nonprofit Sector" report, an evolving resource that collects the most current data on the health of the U.S. nonprofit sector across multiple dimensions in a single, accessible format.

 Brought together more than 1,100 changemakers from across the nation for the 2021 Upswell Summit to focus on our collective mission: building a healthy and racially just sector and nation where all people can thrive.

# August 2021

• Announced Dr. Gail C.
Christopher, awardwinning social change
agent and Executive Director,
National Collaborative for Health
Equity; and Professor john a. powell,
Director, UC Berkeley Othering &
Belonging Institute; as recipients of the 2021
John W. Gardner Leadership Award, which
recognizes transformative leaders whose work
has empowered constituencies, strengthened
participation, inspired movements, and
improved communities.

 Partnered with Othering & Belonging Institute (OBI) at the University of California, Berkeley on our respective annual events, Upswell and the Othering & Belonging Conference to accelerate our shared vision.

# November 2021

- Through NIIAG, issued joint statement applauding U.S. House passage of the Infrastructure Investment and Jobs Act, noting that "Nonprofit organizations have played a critical role in responding to the health and economic crisis, and this legislation will help them further lift up their communities in the months and years to come."
- Issued statement applauding Build Back Better Act passage in the U.S. House, noting "its historic investments in priorities that will help the nonprofit sector in its work to ensure all people thrive."



# September 2021

Announced Maria Yuan, Founder and CEO of IssueVoter, as recipient of the 2021 American Express NGen Leadership Award, which

honors one accomplished leader age 40 or under who has already demonstrated significant impact in addressing society's critical needs.

# December 2021

Released new poll that that found that 88% of voters supported a permanent charitable giving tax deduction for people in the U.S. and 74% of voters support increasing the cap to \$4,000 per person. The poll also revealed strong public support for nonprofits having official government representation and engaging in nonpartisan civic engagement.

D7.21 — 08.21 — 09.21 — 10.21 — 11.21 — 12.21

# **INDEPENDENT SECTOR**

BY THE NUMBERS



6,800+ **PEOPLE** engaged at IS and Upswell Events



PEOPLE registered for Upswell Events



**OF UPSWELL POP-UP SPEAKERS** were Black, Native, Latinx, Asian, or other person of color



**REPORTED** they received useful information about anti-racism from Upswell Pop-Ups



**REPORTED** they felt a sense of community with other Upswell community members during Upswell Pop-Ups



**IS MEMBER ORGANIZATIONS** 



764,548

TOTAL WEBSITE PAGE VIEWS



57,486

**TOTAL SOCIAL MEDIA FOLLOWERS** 



1,834,812

**SOCIAL MEDIA IMPRESSIONS** 

# **FINANCIALS**

**CONSOLIDATED STATEMENT OF FINANCIAL POSITION** December 31, 2021 (With Comparative Totals for 2020)

	2021			2020	
Assets					
Cash	\$	7,567,510	\$	8,710,937	
Investments		11,237,703		10,366,760	
Accounts and other receivables		72,551		31,928	
Grants receivable and promises to give, net		802,000		1,778,961	
Prepaid expenses and other assets		146,206		101,500	
Deferred compensation plan assets		173,210		134,763	
Deferred rent receivable		245,492		215,960	
Deferred lease incentives		107,394		130,365	
Leasing commission costs, net		64,162		89,254	
Property and equipment, net		23,548,514		24,445,210	
Total assets	\$	43,964,742	\$	46,005,638	
Liabilities and Net Assets					
Liabilities:					
Accounts payable and accrued expenses	\$	738,293	\$	683,479	
Deferred rent liability		2,315		3,520	
Refundable advance		_		841,995	
Deferred compensation plan liability		173,210		134,763	
Notes payable		8,460,561		8,845,174	
Deposits held in escrow	74,718		91,234		
Total liabilities		9,449,097		10,600,165	
Net assets:					
Without donor restrictions:					
Undesignated		21,261,667		23,950,105	
Board designated		8,950,733		8,346,107	
		30,212,400		32,296,212	
With donor restrictions		4,303,245		3,109,261	
Total net assets		34,515,645		35,405,473	
Total liabilities and net assets	\$	43,964,742	\$	46,005,638	

# **CONSOLIDATED STATEMENT OF ACTIVITIES** Year Ended December 31, 2021 (With Comparative Totals for 2020)

	2021			2020	
	Without Donor Restrictions	With Donor Restrictions	Total	Total	
Revenue and support					
Grants and contributions	\$ 3,438,406	\$ 2,637,939	\$ 6,076,345	\$ 13,492,577	
Membership contributions	1,760,650	_	1,760,650	1,598,430	
Rentalincome	859,698	_	859,698	1,125,792	
Conference fees	42,916	-	42,916	90,136	
Investment return designated for current operations	350,000	-	350,000	316,000	
Publication sales and other	87,632	_	87,632	81,014	
Net assets released from restrictions:					
Satisfaction of program restrictions	173,089	(173,089)	_	_	
Satisfaction of time restrictions	1,270,866	(1,270,866)	-	-	
Total revenue and support	7,983,257	1,193,984	9 ,177,241	16,703,949	
Expenses					
Program services:					
Community building	2,239,121	_	2,239,121	1,719,661	
Policy leadership	2,040,795	_	2,040,795	1,893,372	
Sector health	425,028	_	425,028	-	
Membership engagement	209,654	_	209,654	125,969	
Communications and marketing	1,795,324	_	1,795,324	1,339,599	
Programs and practice	_	_	_	755,163	
Total program services	6,709,922	_	6,709,922	5,833,764	
Supporting services:					
Fundraising	963,549	_	963,549	805,673	
Finance and operations	340,054	_	340,054	997,066	
Executive offices	1,235,413		1,235,413	876,529	
Total supporting services	2,539,016		2,539,016	2,679,268	
Building services:					
Tenant operations	907,251	_	907,251	917,763	
Building operations	446,855	_	446,855	452,033	
Total building services	1,354,106	_	1,354,106	1,369,796	
Total expenses	10,603,044	_	10,603,044	9,882,828	
Change in net assets before investment return	(2,619,787)	1,193,984	(1,425,803)	6,821,121	
Investment return in excess of amounts for current operations	535,975	_	525 075	41/, 200	
Tot current operations			535,975	614,388	
Change in net assets	(2,083,812)	1,193,984	(889,828)	7,435,509	
Net assets					
Beginning	32,296,212	3,109,261	35,405,473	27,969,964	
Ending	\$ 30,212,400	\$ 4,303,245	\$ 34,515,645	\$ 35,405,473	

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