LEAD ON
2013 ANNUAL REPORT
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The United States is home to more than 1.6 million nonprofits, foundations, and religious congregations that work to improve lives. They are known collectively as the “independent sector” as distinct from business and government.

Independent Sector is the nonpartisan leadership network for nonprofits, foundations, and corporations committed to advancing the common good. Our members’ networks collectively represent tens of thousands of organizations and individuals locally, nationally, and globally.

OUR VISION
A just and inclusive society and a healthy democracy of active citizens, effective institutions, and vibrant communities.

OUR MISSION
To advance the common good by leading, strengthening, and mobilizing the nonprofit and philanthropic community.

OUR VALUES

INDEPENDENCE
• The freedom to be creative and uplift the human spirit
• The right to advocacy and freedom of speech
• A commitment to promoting and protecting the independence of the sector
• An obligation to serve as a leading voice for the common good

INCLUSION AND DIVERSITY
• Embracing a variety of perspectives and people
• Respect for the views of others

INTERDEPENDENCE
• Productive cooperation between the public, private, and nonprofit sectors
• Effective collaboration between funders and grant recipients

SOCIAL JUSTICE
• Full and fair opportunities for all
• Appreciating the worth and dignity of each person

TRANSPARENCY, INTEGRITY, AND ACCOUNTABILITY
• A commitment to the highest possible ethical standards
• Open and timely sharing of financial, governance, and program information
• Responsiveness to society, members, and stakeholders

OPERATIONAL EXCELLENCE
• Effective programs and activities that meet meaningful needs
• Efficiency in the use of resources
MESSAGE FROM OUR CHAIR AND PRESIDENT

LeadOn

The headlines of 2013 reported a growing political leadership vacuum in Washington, D.C. – sequestration, the government shutdown, a continuing impasse on climate change, gun control, and immigration. There was news of the widening income gap, entrenched underemployment, and the bankruptcy of one of America’s great cities, issues requiring Herculean efforts by government, business, and the charitable sector. It also was a year in which soon-to-be retiring leaders of key committees decided that it was time to reform the tax code.

Throughout 2013 and into 2014, Independent Sector worked with Congress and the White House to inform the critical process of comprehensive tax reform and ensure that donors will continue to be encouraged to give through generous tax incentives, including being able to donate from their IRAs without adverse tax consequences. As always, our success depended upon a dynamic coalition of IS members and partners who made compelling cases for the value of our work in helping millions of people and causes, locally, nationally, and globally.

Many people connect with IS through our national conference, and this past year was no exception. Our “LeadOn” Conference in New York City set records for attendance, fundraising, scholarships, artists in residence, and social media outreach. Main-stage presentations on leveraging the power of innovation, rallying to our common purpose as a nation, and our sector’s commitment to leadership – together with scores of in-depth breakout sessions – made us think in new and creative ways about how best to positively impact the people and causes we serve.

With the addition of our C-Suite track for people reporting to the CEO, IS leadership programs now touch the full continuum, from emerging leaders taking part in our NGen program to the CEOs who must, if they are to succeed, wrap their leadership around the volatility, uncertainty, complexity, and ambiguity of our times.

As IS heads into the final year of its strategic plan and thinks about the future, we are well served by the talented partners with whom we work every day. There is no shortage of challenges before us, and we remain convinced that the best way to achieve our respective purposes is to stand shoulder to shoulder in our common quest to make the world a better place.

Stephen B. Heintz
Chair

Diana Aviv
President and CEO
2014* BOARD OF DIRECTORS
*The following Board Members commenced their term of service on September 30, 2013.

OFFICERS*
CHAIR
Stephen B. Heintz
President
Rockefeller Brothers Fund

VICE CHAIR
Ralph B. Everett
President and CEO
Joint Center for Political and Economic Studies

TREASURER
Lorie A. Slutsky
President
The New York Community Trust

SECRETARY
Kelvin H. Taketa
President and CEO
Hawai‘i Community Foundation

AT-LARGE EXECUTIVE COMMITTEE MEMBER
Risa Lavizzo-Mourey
President and CEO
The Robert Wood Johnson Foundation

EX-OFFICIO
Diana Aviv
President and CEO
Independent Sector

BOARD MEMBERS
Deborah Alvarez-Rodriguez
Interim President and CEO
East Bay Community Foundation

Barbara R. Arnwine
Executive Director
Lawyers’ Committee for Civil Rights under Law

*Jeffrey L. Bradach
Managing Partner and Co-Founder
The Bridgespan Group

*Risa Lavizzo-Mourey
President and CEO
The Robert Wood Johnson Foundation

*Irene Hirano Inouye
President
U.S.-Japan Council

*Robert L. Lynch
President and CEO
Americans for the Arts

*Timothy J. McClimon
President
American Express Foundation

Steven J. McCormick
President
Gordon and Betty Moore Foundation

Bernard J. Milano
President and Trustee
KPMG Foundation

Neil Nicoll
President and CEO
YMCA of the USA

Mariam C. Noland
President
Community Foundation for Southeast Michigan

Michael S. Piraino
Chief Executive Officer
National CASA Association

Wendy Purifoy
Education Director
The Barr Foundation

Paul Schmitz
Chief Executive Officer
Public Allies, Inc.

Roberto Suro
Professor of Journalism and Public Policy
The University of Southern California

*Sandra L. Vargas
President and CEO
The Minneapolis Foundation

Ellen Alberding
President
The Joyce Foundation

Susan Berresford

Our Sincere Appreciation Goes To These Board Members Whose Terms of Service Concluded on September 30, 2013.

Rev. Larry Snyder
President
Catholic Charities USA

Richard B. Williams
Senior Advisor
American Indian College Fund
2014 * COMMITTEE CHAIRS

*The following Committee Chairs commenced their term of service on September 30, 2013.

2014 NATIONAL CONFERENCE HOST COMMITTEE CO-CHAIRS
Luz A. Vega-Marquis
President and CEO
Marguerite Casey Foundation

Sonya Campion
Trustee
Campion Foundation

2014 CONFERENCE PROGRAM COMMITTEE
Neil Nicoll
President and CEO
YMCA of the USA

2014 CONFERENCE PROGRAM COMMITTEE VICE CHAIR
Michael S. Piraino
Chief Executive Officer
National CASA

AUDIT COMMITTEE
Bernard J. Milano
President and Trustee
KPMG Foundation

COMMUNICATIONS COMMITTEE
Roberto Suro
Professor of Journalism and Public Policy
The University of Southern California

EXECUTIVE COMMITTEE
Stephen B. Heintz
President
Rockefeller Brothers Fund

FUND DEVELOPMENT COMMITTEE
Mariam C. Noland
President
Community Foundation for Southeast Michigan

GOVERNANCE AND NOMINATING COMMITTEE
Neil Nicoll
President and CEO
YMCA of the USA

INVESTMENT SUBCOMMITTEE
C. Richard Mattingly
Executive Vice President and COO
Cystic Fibrosis Foundation

JOHN W. GARDNER LEADERSHIP AWARD COMMITTEE
Wendy Puriefoy
Education Director
The Barr Foundation

MEMBERSHIP COMMITTEE
Deborah Alvarez-Rodriguez
Interim President and CEO
East Bay Community Foundation

C-SUITE ADVISORY GROUP
Richard Parnell
Chief Operating Officer
UN Foundation

NGEN ADVISORY GROUP
MacArthur Antigua
Director, Alumni Engagement
Public Allies, Inc.

AMERICAN EXPRESS NGEN LEADERSHIP AWARD COMMITTEE
Kyle Caldwell
Program Director
Pathways Out of Poverty
Charles Stewart Mott Foundation

AMERICAN EXPRESS NGEN FELLOWS SELECTION COMMITTEE
Steven J. McCormick
President
Gordon and Betty Moore Foundation

PROGRAMS AND PRACTICE COMMITTEE
Irene Hirano Inouye
President
U.S.-Japan Council

PUBLIC POLICY COMMITTEE
Sandra L. Vargas
President and CEO
The Minneapolis Foundation

OUR SINCERE APPRECIATION GOES TO THE FOLLOWING COMMITTEE CHAIRS WHOSE TERMS OF SERVICE CONCLUDED ON SEPTEMBER 30, 2013.

2013 NATIONAL CONFERENCE HOST COMMITTEE
Lorie A. Slutsky
President
The New York Community Trust

2013 NATIONAL CONFERENCE PROGRAM COMMITTEE
Ralph B. Everett
President and CEO
Joint Center for Political and Economic Studies

2013 NATIONAL CONFERENCE PROGRAM VICE CHAIR
Julie L. Floch
Partner and Director, Not for Profit Services
EisnerAmper LLP

AUDIT COMMITTEE
Mariam C. Noland
President
Community Foundation for Southeast Michigan

FUND DEVELOPMENT COMMITTEE
Michael S. Piraino
Chief Executive Officer
National CASA

JOHN W. GARDNER LEADERSHIP AWARD COMMITTEE
Bernard J. Milano
President and Trustee
KPMG Foundation

MEMBERSHIP COMMITTEE
Paul Schmitz
Chief Executive Officer
Public Allies, Inc.

AMERICAN EXPRESS NGEN LEADERSHIP AWARD SELECTION COMMITTEE
Steven J. McCormick
President
Gordon and Betty Moore Foundation

PUBLIC POLICY COMMITTEE
Kyle Caldwell
Program Director
Pathways Out of Poverty
Charles Stewart Mott Foundation
HIGHLIGHTS from 2013

LEAD ON

Napoleon said the role of a leader is to “define reality and give hope.” It is very hard as a leader to define reality. You have people that are trying to lead you astray. You have well-intentioned people who want to hold back in telling you what the real deal is. So defining reality is absolutely critical. But then it’s not enough just to define reality. What are the reasons to be hopeful? What are the strategies? What are the tactics that you’re going to put in place? Because at the end of the day, a leader, a real leader, takes you from where you are today to where you need to be.

- Kenneth I. Chenault, CEO and Chairman, American Express

Independent Sector’s watch-cry in 2013 was “LeadOn.” And so we did in challenging times. We fought for fair laws and policies, promoted best practices in ethics and accountability (E & A), and strengthened nonprofit leaders of diverse ages and experiences – all the while engaging leaders of color and underrepresented communities.

- The leadership of donors of many stripes (see p. 36) made our leadership possible.
- Outstanding fundraising, host, and program committees and countless other partners helped shape an IS conference that hit new heights.
- In tandem with Public Citizen’s Bright Lines Project, we put into perspective the IRS proposed rule on political activity by 501(c)(4) social welfare organizations.
- Work continued on Charting Impact with GuideStar USA and BBB Wise Giving Alliance.
- We explored E & A safeguards with partners like NYU’s National Center on Philanthropy and the Law.
- IS again provided continuing education on nonprofit law and practice in partnership with Georgetown University.
- To identify models for the future, IS engaged members and allies to analyze current trends in membership strategies and networked organizations.
- IS board members, other sector leaders, and diverse experts began the process of envisioning where IS is going and what will be needed to lead 15-20 years out.

The pages that follow contain other highlights of IS leadership in action on many fronts during 2013. For more details, please visit www.independentsector.org
IS Issues New Report on Nonprofit Workforce
Financial Security and Careers in the Nonprofit and Philanthropic Sector, a study conducted by IS and TIAA-CREF Institute, found that 45 percent of employees in the nonprofit sector lack confidence in their ability to prepare financially for retirement.

IS Leader Comments on IRS Controversy
Diana Aviv said: “The IRS’s proper role in approving, and subsequently regulating, exempt organizations is not determining the worthiness of their cause, but their compliance with the law.”

New Estimate for Value of Volunteer Time
IS announced the 2012 national estimate for the value of a volunteer hour was $22.14, a 35-cent increase from 2011. Charitable organizations use this estimate to quantify the enormous value volunteers provide.

IS Welcomes 2013 NGen Fellows
Twelve outstanding leaders from IS member organizations were named 2013 American Express NGen Fellows.

Protect Charitable Deduction in Sequestration, Says IS
IS’ statement argued that capping the charitable deduction penalizes millions of individuals, families, and communities that rely on programs and services provided by America’s nonprofit and philanthropic sector.

IS President and CEO Testifies on Tax Reform and Charitable Giving
Diana Aviv told House Ways and Means Committee members: “The charitable deduction is a crucial incentive that gets people to give, and give more generously than they otherwise would.”

IS Statement on President’s 2014 Budget
IS called on “policymakers in Washington to explore ways to increase, rather than decrease, the incentive for Americans to support their communities through charitable giving, and encourage the administration to work with our sector on identifying additional streams of revenue for charitable organizations.”

Sarah Johnson Wins 2013 American Express NGen Leadership Award
The director of Carnegie Hall’s Weill Music Institute advocates for performing arts organizations to become good cultural citizens. (Award presented by IS Board Member Steven J. McCormick)

Connie Rice Honored with 2013 John W. Gardner Leadership Award
Advancement Project co-founder and ground-breaking civil rights attorney, Connie Rice, was recognized for transforming violence prevention in Los Angeles and across the country. (Award presented by IS Board Member Irene Hirano Inouye)
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IS President and CEO Opposes Lifting Ban on Political Activity
“Independent Sector is deeply troubled by a proposal… to lift the ban on political activity by 501(c)(3) organizations, including religious organizations. We urge all policymakers to reject any proposal that will ultimately undermine the public trust in these charitable organizations…”

The Washington Post
IS Comments on Washington Post Investigative Report
“Zero tolerance of unethical or illegal actions no matter how seldom they occur is essential to maintaining the public trust…We believe that the majority of nonprofit boards and staff honor their obligation to open, transparent, and ethical stewardship of their organizations.”

The New York Times
Diana Aviv Warns of Threats to Tax Incentives for Giving in NYT
“It’s not about hurting the sector; it’s hurting the causes and people we’re serving.”

LeadOn Breaks Record for Attendance, Fundraising, and Scholarships

IS Sends a Strong Message on Charitable Deduction
IS mobilized 1,245 organizations to join a sign-on letter to the U.S. Senate in support of protecting the charitable deduction during tax reform deliberations.

IS Welcomes 2013 NGen Fellows
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IS to Convene Sector on Political Activity
IS hosted a strategy meeting with legal experts and sector leaders, convened an interactive sector-wide webinar, and submitted detailed comments to the IRS signed by more than 100 nonprofits and other stakeholders.

In the News
Diana Aviv co-authored op-eds on proposed IRS rules on political activity that were published in The Washington Post and The Chronicle of Philanthropy.

The Chronicle of Philanthropy
In the News
THE POLICY CHALLENGE

The charitable sector came under close scrutiny in 2013 and, on occasion, it came under fire.

Policymakers, working to balance budgets and pay for their own priorities, took a green eyeshade to our sector’s revenue streams. For the sixth consecutive year, the President’s fiscal year 2015 budget sought to limit the value of the charitable deduction at 28 percent for high-income taxpayers to generate additional tax revenue. At the same time, Congressional consideration of comprehensive tax reform – last enacted in 1986 – began in earnest and with it came a heightened climate of uncertainty concerning laws and policies fundamental to the charitable sector and the people we serve.

Rallying our community around a common policy agenda and a more favorable regulatory and legislative environment requires strong, incisive, and trusted leadership. Our two primary goals: to maximize support for the work of public charities and private foundations and to ensure that potential changes to the rules governing tax exempt status strengthen the ability of all organizations to serve their charitable missions.

In February 2013, IS President and CEO Diana Aviv testified before the House Ways and Means Committee, chaired by Rep. Dave Camp (R-MI). In July, IS mobilized 1,245 organizations to join a sign-on letter to the U.S. Senate in support of protecting the charitable deduction during consideration of tax reform.

In November, following a meeting with IS staff, senior Finance Committee member, Senator Charles Schumer (D-NY), introduced legislation to expand and make permanent the IRA charitable rollover. Nearly 500 organizations subsequently signed a letter to all U.S. Senate offices in support of the IRA charitable rollover and requesting co-sponsorship of Sen. Schumer’s bill.

SAFEGUARDING ADVOCACY FOR TAX-EXEMPT ORGANIZATIONS

When news broke in May 2013 that the IRS had inappropriately scrutinized certain applications for exempt status, President and CEO Diana Aviv led a sector-wide conference call with tax policy experts on the implications. Later, in response to proposed IRS regulations regarding 501(c)(4) political activity, IS hosted a strategy meeting with legal experts and sector leaders, convened an interactive sector-wide webinar, and submitted to the IRS detailed comments signed by a diverse group of more than 100 nonprofits and other stakeholders outlining concerns with the proposed regulations.

Diana Aviv co-authored opinion pieces on the proposed IRS rules in The Washington Post and The Chronicle of Philanthropy in December and, in February 2014, testified before a subcommittee of the House Oversight and Government Reform Committee about the charitable sector’s concerns with the proposed IRS regulations.

In September, at LeadOn, the IS National Conference in New York, the tenth annual Public Policy Action Institute focused on the importance of advocacy messaging and ways in which sector leaders can use the tools at their disposal to have an impact on the key issues for the nonprofit world. Sector leaders guided discussions on the importance of nonprofits in the advocacy realm, and explored the issues at stake during tax reform.
LEADERSHIP DEVELOPMENT

Two core aspects of IS’ mission are to lead and strengthen the nonprofit and philanthropic community.

Throughout 2013, IS sought to ratchet up the capacity of key groups of individuals who are the lifeblood of nonprofit organizations – such as emerging leaders age 40 and under and C-Suite leaders. Together with the robust CEO Track that takes place during the IS National Conference, these activities now touch the full leadership continuum.

The American Express NGen Fellows program completed its fifth year and a new cohort already is working to hone their skills and address key issues affecting our sector. An in-depth evaluation is guiding the program’s future – one made even brighter by American Express’ decision to fund the program for three more years. For the first time, the 2013 Fellows selected their collaborative project by issuing an RFP to the entire IS membership. They selected a client whose topic has implications for the sector at large: diversity in staffing.

The 2013 NGen Pre-Conference program in New York was attended by more people than ever before – 165 emerging leaders. IS launched the C-Suite program with a 2013 national conference track, attracting more than 160 attendees, and is using this successful launch as a platform to build-out the program during 2014.

Four leadership development webinars tackled important issues – including one held in conjunction with Case Foundation’s Be Fearless Campaign.
NETWORKS AND MEMBER ENGAGEMENT

Member engagement drives four critical aspects of our work: impact, reach and diversity, ideas and insights, and revenue.

As the only national organization that brings together nonprofits, foundations, and corporations around all kinds of charitable endeavors, our members are the true cross-section of the vibrant nonprofit sector. Members include organizations with one volunteer staff person to the largest funders in the world. We represent all types of activity for the common good – in the fields of arts and culture to health and the environment.

Over the past year, IS explored trends and challenges in membership associations generally and took a “deep dive” into the IS network to inform our thinking about how best to strengthen and mobilize our community. We heard from members that you want more opportunities for meaningful engagement and more information that can help you thrive. As usual, we are hard at work on both fronts.
LEADON: THE 2014 NATIONAL CONFERENCE

Held just steps from New York City’s theater district, the 2013 IS National Conference resembled, in some respects, a hit Broadway show. It had unprecedented popular appeal, record box office, an inspiring script, dynamite music, and glowing reviews that echoed for months to come.

Leaders and experts from grantmakers and charities from many different subsectors and all parts of the country reinforced IS’ reputation as a sector convener. Influential attendees new to IS came away with an appreciation for our work and members received the tangible benefits of a well-programmed conference that attracted leaders of the nonprofit sector and beyond. The Hub, our conference social networking site, buzzed with activity, as did Twitter.

Thanks to the leadership of fundraising chair Darren Walker, president of the Ford Foundation, and the generosity of numerous local and national supporters (see p. 37), IS secured a record $2,050,000 to fund the conference, including $370,000 towards the awarding of 215 scholarships selected from a competitive pool of more than 330 applicants. Fifty-eight scholarships were awarded nationally and more than 150 locally to a diverse and talented group of nonprofit professionals from the New York City region.

Each year, the national conference is the concrete realization of key approaches identified in the IS strategic plan to strengthen the sector’s voice, leadership, and impact, by:

- Identifying and discussing issues that have the potential to dramatically to affect the sector’s impact.
- Engaging and convening diverse leaders and networks from across the nonprofit and philanthropic community and beyond to share and exchange their ideas.
- Developing solutions and interventions to address issues that will increase the sector’s impact, working in partnership with others and building on existing strengths and knowledge.
- Mobilizing for change through a broad network of nonprofit and philanthropic leaders, government officials, business allies, and other stakeholders.

Finally, the LeadOn conference continued to break new ground for arts programming and the integration of more than 80 artists contributing to the conference as breakout session panelists, presenters, and performers on our main stage.

Opening Plenary Encore: Wynton Marsalis on Jazz and Cultures of Resilience

Here is just one example of the rich artistic traditions represented at LeadOn. These remarks are excerpted from a dialogue between musician-composer-teacher Wynton Marsalis and Judith Rodin (above left), president of the Rockefeller Foundation.

Your art form will necessarily come from your communal aspirations. Where else is it going to come from? Once again, it’s very basic ideas. Your community aspires to something. In the case of jazz, it was people aspiring to communicate with one another across the tribal narrative that they were living in, that we still live in, and that we still struggle with.

Jazz is constructed in a way with the balance of powers that forces the reconciliation of opposites. It’s another thing we always see with some type of innovation, why you always say, “Wow! I don’t see how they put that together.” The way they put it together is they thought something you thought was an opposite, but then realized, “This is not really opposite; it’s actually the same thing. So if we do this, make this little recalibration of our thinking, we can work together.”

Resilience is in your stories. Innovation also is what do we remember and how do we combine the things that we remember. Okay, just take, for example, New Orleans. Of course, we all know about Katrina as the most famous hurricane. When I was growing up, there were hurricanes before me, and there was a time that the levee flooded in the 1920s. “Oh, it wasn’t bad as the one in the ’20s.” People would brag about how bad a hurricane was. “No, the worst ever was Betsy. Lord have mercy. Betsy came through here and tore everything up. We never thought we would come back from it, but here we are.” So if you heard those stories, you had tremendous respect for Betsy, and then somebody would say, “Well, Betsy wasn’t bad as Camille. Camille was worse than Betsy. Oh no, Marjorie. Camille wasn’t as bad as Betsy. Betsy was. My grandfather lost both of his properties and the trees,” and then they start telling you what made one worse than the other. They would start to battle with whose was the worst.

Then at the end of it, it would be, “But we still here.” So you have a culture of resilience.
By the Numbers

8,079
individuals actively engaged in IS programs, national conference, committees and ad hoc groups, in-person convenings, webinars, and conference calls, and calls to action. Many of the individuals involved took part in multiple activities.

3,537
individuals attended events and presentations featuring IS’ CEO and staff experts.

5,686
individuals regularly receive IS educational newsletters and digests.

Our Diverse Membership

IS Membership by Location
IS members are spread across the country and throughout the world.

IS Membership by Size
The approximately 500-member IS coalition consists of organizations of every size.

Policy & Advocacy

1200
attendees for 9 policy webinars

115
meetings on Capitol Hill

1245
organizations join sign-on letter to U.S. Senate in support of protecting the charitable deduction

Nearly 500
organizations signed a letter to all U.S. Senate offices in support of charitable extenders.
Nearly 500 organizations signed a letter to all U.S. Senate offices in support of charitable extenders.

President and CEO Diana Aviv spoke multiple times and in over a dozen cities in 2013, tackling the topics of leadership, the future of the sector, and trends shaping our work. Diana also led the roll-out of Beyond the Cause: The Art and Science of Advocacy, IS’ in-depth study of the elements of successful advocacy, completed in 2012. Presentations of key findings and trainings were conducted for advocates across the US and Canada in cooperation with IS member nonprofits and foundations.

IS communications efforts extended Independent Sector’s reach and influence as a thought leader. Throughout 2013, social media was used to mobilize our membership and the nonprofit sector as a whole around IS priorities. With a particular focus on policy work and our national conference, IS communications engaged hundreds of thousands of people to participate in tangible outcomes that aligned with strategic priorities and built community within our network.

Through social media messaging and the use of the hashtag #protectgiving, IS created a venue where we could stand with organizations such as World Vision USA, Global Impact, The United Way, and others to speak as one voice to protect vital tax deductions that were slated to be cut. This campaign reached over 100,000 accounts and garnered over 100 tweets from 56 contributors.

Our national conference not only engaged 1.2 million people via Twitter but also, in conjunction with the Hub, our mobile app, enriched the experience around the conference and strengthened connections between NGen and C-Suite leaders. They now meet on a regular basis and continue to support IS and each other through social media, increasing our visibility as an organization and solidifying our reputation as a bridge-builder.

In early 2014, the nonprofit sector encountered new challenges. Our #501CForward and #protectgiving campaigns helped to raise awareness about critical sector issues and the #protectgiving campaign in particular contributed to a spirited response from the sector. Five hundred organizations signed on to an IS letter that went to all Senate offices calling for the restoration of the IRA charitable rollover and the extension of all charitable tax extenders.
RESOURCE DEVELOPMENT

Guided by Independent Sector’s strategic priorities, the Resource Development team creates opportunities for individuals, foundations, and corporations to support IS’ work. These generous supporters are listed on pages 36-38.

In 2013, IS launched its Business Development Program to create a new revenue stream to fund our work on behalf of the nonprofit sector and to enhance IS’s long-term financial sustainability. IS piloted its new Innovations Sessions program at the 2013 National Conference, opening up a new channel of discussion and dialogue on services to improve nonprofit operations. IS is excited to be expanding the Innovations program in 2014.

As we go to press, IS is putting the finishing touches on its new Affinity program to give members and their affiliates exclusive access to and discounts on important products and services offered by a group of pilot participants. The initial focus of the Affinity Program is to provide products and services in areas that our members and broader network of constituents have identified as relevant and useful to their operations.

The Innovations Pavilion attracted a record 70 exhibitors, representing 33 organizations, who were given the maximum platform to display their products and services and give demos in the Presentation Pavilion (pictured below). New this year: a mobile app allowing exhibitors to generate leads and match attendees to their services.
A decade ago Independent Sector began interviewing and profiling a wide spectrum of exemplary member CEOs whose leadership is an inspiration to us all. This year we present an expanded special edition of “Vital Voices” with the understanding that our shared story is best told through their eyes.
Joe Benincasa
President and CEO, The Actors Fund

While the headlines in Variety herald the “big bucks” blockbuster movies grossed last weekend, the average actor in America makes $27,000 a year; musicians and singers, $23,000; and dancers, $20,000. “Most members of the creative community earn a very modest living and many are poor,” says Joe Benincasa, the president and CEO of The Actors Fund. With this in mind, The Actors Fund helps people in the creative community with nursing care, supportive and affordable housing, financial assistance and social services, free health care and health insurance counseling – even with help developing parallel or second careers.

Last year this safety net helped more than 17,000 individuals. “Actors are twice as likely not to have health care as the national average,” says Joe, pointing to the free care provided in midtown Manhattan at The Actors Fund’s Al Hirschfeld Free Health Clinic by dozens of volunteer residents and doctors. Its four residences include a joint venture with affordable housing developer Common Ground, which yielded more than 200 studio apartments in Brooklyn for low income people in the performing arts – as well as a home for the Brooklyn Ballet and a black box theatre used by 80 not-for-profit arts’ groups. On the West Coast, The Actors Fund partnered with West Hollywood Community Housing Development Corporation to build enhanced housing for people with HIV/AIDS. And recently, the West Coast-based MusiCares Foundation helped The Fund expand its nursing home and assisted living care facility home in Englewood, New Jersey.

“I can’t think of anything we do that doesn’t have a partnership or an element of collaboration,” says Joe, who has led The Fund for a quarter century. In 2013, when Brian Stokes Mitchell (pictured, right) – who chairs The Actors Fund Board – performed at the LeadOn 2013 conference in New York City, “we decided it was time to join the ranks of all the great nonprofits in the Independent Sector.”

From Joe’s perspective, artists give much more than they receive. “They help us get through the bad times. They lift people’s spirits. They help us examine our own lives by comparing ourselves to people playing a role. It’s important work.”
“People said my neighborhood was gang-infested and not a good place to run,” Alicia Gonzalez recalls. “But my parents told me that it was important to know my neighborhood and be proud of it. So I ran anyway. I wanted to give that same opportunity to the kids of Chicago.”

For Alicia, executive director of Chicago Run, her young nonprofit is about so much more than sport. Running with Alicia and volunteers, children from some of Chicago’s most violence-plagued neighborhoods learn leadership, cross-community relationship building, and community pride while working towards mental and physical health.

“Running is an escape for many kids who don’t otherwise have one,” Alicia explains. “Once, a student I knew didn’t come to practice to train for a 5K we had coming up. I asked around, and the others told me his brother had been shot and killed by a gang and his house had been burned down. But two days later, he came back. I ran with him, told him he was brave, and I was a little surprised to see him. He told me, ‘look, running is the only way to keep my mind from exploding. I know my brother would want me to run this race, and he wants me to be here because this is where I’m safe.’”

In 2008, Alicia heard about a local family foundation looking to launch a running charity. She got the grant. Starting with nothing but a laptop, a list of 12 schools, and a local bakery as her office, Alicia built an organization and a new model for reaching out to young people in troubled communities. She worked with Chicago public schools to include running in the curriculum and serve students of all races and backgrounds across the city.

Today, Chicago Run is an IS member and Alicia serves as a 2013 NGen Fellow. “Independent Sector brought me together with an intimate cohort of 12 great leaders from around the country,” Alicia says. “There’s no competition among us—we just share best practices and solve issues together.”

The diverse skills, experiences, and views among her NGen partners and fellow IS members is where she finds the true value of IS—and it is also the value Alicia offers to other members. “Some of my NGen cohort are brilliant consultants with business school backgrounds, and their way of viewing and solving problems is invaluable to me.”

“On the other hand,” Alicia continues, “I work on the ground, in the trenches, in my city. My involvement offers others the chance to watch sustainable change happening in communities and also to truly see how far that foundation dollar goes.”
To John D. Kemp, advocating for people with disabilities has never been about the idea that “life isn’t fair.”

At Henry Viscardi School at The Viscardi Center in Albertson, New York, where he has been president and CEO since 2011, medically fragile students with severe physical disabilities experience pre-K through 12th grade as they would in any public school. They play sports, go to the prom, serve in student government, graduate with the same diploma as their peers – and learn to be responsible advocates. “They learn to be firm about having a meaningful life,” he says, “but also to do their research on why and how to make life fair for everybody.”

“We had a second grade class, all girls,” he recalls. “They were known as the princesses and wore tiaras to school each day. The parent of one applied for a new motorized wheelchair for her daughter. When the insurance company offered a manual wheelchair instead, the girls decided limiting the independence of their classmate was unacceptable.” They sent a letter to the company and the decision was reversed.

The Center’s “power of expectations” philosophy began over 60 years ago with Dr. Henry Viscardi, Jr. the organization’s and school’s founder and advisor to eight U.S. presidents on disability issues. But it also matches the high hopes John’s father had for him as a child born in North Dakota without lower arms and legs. After graduating from Georgetown University and the Washburn University School of Law, John co-founded a disability law practice and served in corporate and non-profit leadership roles – including on Independent Sector’s board for nine years, chairing the government relations committee and eventually becoming vice chair.

“It was such a great learning experience as a 40-year-old to get the wisdom of John Gardner and Brian O’Connell on how to harness the dynamic tension of a board to drive change,” John says. “IS is the only place you can get thought leadership, advocacy, and the leading edge practices that affect not only the operations but also the planning of your nonprofit.”

“THEY LEARN TO BE FIRM ABOUT HAVING A MEANINGFUL LIFE”

Although progress has proved slower than expected, John believes full inclusion for people with disabilities is very possible in 25 or fewer years’ time. He is pursuing two new initiatives: to make The Viscardi Center a nucleus for disability self-employment and entrepreneurship, and to encourage C-Suite professionals to be open about their disabilities. “Disability disappears as people ascend the corporate ladder. We want to take a page from the LGBT community so that people feel confident and proud about their disability regardless of what it may be.”
Earl Lewis
President, The Andrew W. Mellon Foundation

Earl Lewis’ life journey is also the story of a changing nation, still finding its way on the promise of equal justice and opportunity for all.

“I guess you could say that I was part of that transitional generation,” he says. “I grew up in the segregated south and attended segregated schools until tenth grade. With desegregation my life often turned on being the first. I was the first from my high school to attend a small liberal arts college in western Minnesota, the first African American to become provost of a major private southern institution.

“Over the past 40 years, opportunities have materialized that I have not anticipated and each time I was ready to walk through that door. By laying claim to these opportunities, I am symbolic of these changes. And if I am at all successful, that door is not a swinging door but one that remains open.”

Earl’s new door at The Andrew W. Mellon Foundation leads to his office as president. Yet he is no stranger to the venerable institution, having been a grantee in the 1990s and, in recent years, a trustee. The current challenge is to balance continuity with change.

“At the end of the next five-year period, the foundation will celebrate its 50th anniversary,” he notes. “While remaining true to its longstanding commitment to higher education and the cultural and performing arts, it is the moment to consider: What new opportunities should we be concerned with? We have our domestic footprint and our work in South Africa, are there other venues that warrant our support?”

Looking ahead, Earl cites the importance of demographic diversity, with the U.S. becoming a majority nonwhite nation by 2050. “Democracy will not come simply by people living next to each other: Social change is sustained through people working through institutions. Some 20th century institutions may not be fully equipped to address the range of needs and opportunities in the 21st century.” He also points to a “coastal effect” where diversity cleaves to the east and west coasts, leaving a wide swath of the country less diverse.

“WITH DESEGREGATION MY LIFE OFTEN TURNED ON BEING THE FIRST”

This, he says, is a major incentive for higher education to connect with communities. “Along with the military, colleges and universities play a disproportional role in socializing young people for their full place in society. The anchor institutions in municipalities and towns are often colleges. They don’t pick up and move.” Earl believes that these institutions need to “reach out and partner on everything from early childhood to continuing education, enabling people to access critical knowledge and lead a more purposeful life.”

On that note: Earl’s new job affords the opportunity to write and speak on critical issues. Prior to his post as provost at Emory University, Earl regularly turned out volume after volume as a nationally recognized scholar and professor in African American studies and history. “As Russell Menard, a professor of mine, once told me: ‘You never know when you won’t have time to write so if you have some ideas, write them down and put them in the drawer,’” says Earl. “I have a couple of pieces in the drawer.”
Alison McCaffree  
Executive Director,  
Washington Nonprofits

In the warmth of a rural community center on a cold blustery day, Alison McCaffree is reminded of the value of nonprofit partnerships. As executive director of Washington Nonprofits, Alison is in Belfair, Washington, to kick off a Finance 101 training. She’s standing in front of a packed room of nonprofit volunteer treasurers. Some have driven more than two hours, most have paid the $10 enrollment fee, and others needed a scholarship to participate. What made her pause was this: the event volunteers, knowing it would be chilly in the room, brought in their own space heaters from home. Alison explains, “I am reminded that our work goes beyond bringing needed resources to local communities. Our work involves building critical partnerships that allow these resources to make a difference within these communities. I didn’t know this room was going to be cold, but by partnering with a local organization, things were taken care of, and we were comfortable. The environment was set so volunteers could learn how to help their organizations prosper.”

Many don’t understand why someone with engineering degrees from Stanford and MIT, and an MBA from MIT’s Sloan School of Business would devote herself to building a network of nonprofits in Washington State. To Alison is makes perfect sense: “I use my engineering background every day.” At MIT she studied system dynamics, which, she explains, “creates maps of the complex systems that we experience everyday. System dynamics models can test theories about what actions will create our desired outcomes. Being able to test possible policy or program changes against a model before you implement them in the real world is crucial to developing appropriate and cost-effective solutions.”

“My goal is to partner with a major university and create a comprehensive capacity building model for nonprofits. I want to incorporate all our knowledge about what works to build a healthy nonprofit organization.”

Before getting to that complex model, Alison says there is one thing she knows for sure. “Nonprofits need to be ‘heads up.’ So many nonprofit staff are heads down - grinding it out - working hard to get through the day-to-day things that need to be done.” Alison reminds us that we need to pick our heads up regularly, notice new opportunities, and connect with those around us who have ideas and energy that help us realize our missions.

Alison is grateful to the Campion Foundation for the funding that introduced her to Independent Sector and the national conference. Attending the IS conference and partnering with IS on other work are great ways to network with larger nonprofits and foundations, many headquartered on the east coast. “Washington Nonprofits is building the connection between the local and national levels. Through our work, small local organizations understand their national context.”
Heather McGhee
President, Dēmos

The scent of roses, and of victory, were in the air when Heather McGhee, then Director of Demos’ Washington Office, sat two rows from the stage for President Obama’s signing of the Dodd-Frank Wall Street Reform and Consumer Protection Act of 2010. “That came out of work we did over a decade to build the case for smart regulation and to show that the financial insecurity of working and middle-class families was a manifestation of larger problems in the economy,” she explains.

It is fitting that a public policy organization committed to an America where “all have an equal say in our democracy and an equal chance in our economy” would be called Demos, which means “the people.” Named Demos’ new president in late 2013, Heather is clear about what’s on the horizon for the nearly 14 year-old organization. She plans to continue to steer Demos toward the long view. “We champion ideas that are powerful enough to improve the lives of millions; we take the long view to advance reforms that are necessary even if they’re not politically possible at the outset,” says Heather.

Demos has three compass points, Heather says: “Achieving a true democracy, creating pathways to ensure a diverse and expanded middle class, and then, transforming the public narrative to elevate the values of community and racial equity.”

Heather says the real strength of the sector is in its collective power. She looks to IS as the sector leader. “IS has been a remarkable place for us all to reflect on why we are different from the public and private sectors, and what we share in common, as disparate as our goals and agendas might be.”

“The annual conference is a wonderful time to deepen and create new relationships, and to think together about the broader purpose of being an organization which is not for profit but is for impact,” says Heather.

IS and other sector organizations should “recognize how much power we have together and be conscious of, and deliberate about, the ways we address what I think are the core issues of our time – the balance between the public and private sector and the rising inequality in our democracy and our economy. I want to continually lead my team in asking the question: what does the movement need from Demos in order to bring a more equitable future closer?”

“WE CHAMPION IDEAS THAT ARE POWERFUL ENOUGH TO IMPROVE THE LIVES OF MILLIONS’’
Donna Murray-Brown
President and CEO, Michigan Nonprofits Association

Donna Murray-Brown believes that both the nonprofit sector and her state of Michigan are at a critical turning point, where value and sustainability will prove essential to long-term success. “The challenges we’ve faced in Michigan have awakened the consciousness of what the nonprofit sector can contribute,” says Donna. “We can be catalysts of democracy and equity, as well as architects of thriving communities down to the neighborhood level.”

While Donna is MNA’s first woman president, she is no newcomer – rather a five-year veteran who has held a series of important posts, from director of the Metro Detroit Partnership Office to senior director of capacity building. She led a successful strategic alliance program for arts and culture organizations in Metro Detroit and the merger negotiations of four organizations to create the Belle Isle Park Conservancy. To help catalyze a culturally diverse pipeline of nonprofit leaders, Donna engaged with the Wisconsin-based national service program Public Allies and the New York-based National Urban Fellows.

Coming from the world of finance, Donna finds it only natural to have generating revenue top of mind. But the way in which she has worked to position the Association at the center of revitalizing the state and revolutionizing the financial viability of the sector is a noteworthy development.

Entering the nonprofit sector was something Donna always planned to do but, in truth, she says her transition happened much more quickly than she had anticipated. In her role as a banking executive, Donna served on many boards of directors and played a vital role in community reinvestment, funding programs that made a difference in the lives of local people. This involvement sparked her interest in taking the work a step further and partnering with nonprofits instead of just investing in them.

Donna believes that emphasizing access to information, diversity and inclusion, civic engagement, and capacity building will fuel MNA’s renewed commitment to serve, strengthen, and transform Michigan nonprofits.

The Michigan Nonprofit Association is now working on state-wide projects to increase employment and job readiness, assessing widespread housing issues, and spurring volunteerism in the community to accelerate the rebuilding of the state. Donna believes that many of these undertakings and the decision to pursue her career as a trailblazing chief executive in the nonprofit sector were “made possible in part due to my involvement with Independent Sector. My experience at the Independent Sector national conference in San Francisco was a defining moment that gave me the confidence to pursue the great challenges that come with being a leader in the nonprofit sector.”

“THE CHALLENGES WE’VE FACED IN MICHIGAN HAVE AWAKENED THE CONSCIOUSNESS OF WHAT THE NONPROFIT SECTOR CAN CONTRIBUTE”
Sarah Stachowiak  
Chief Executive Officer, ORS Impact & Team

Organizations in the charitable sector often ask ORS Impact to answer some of the most difficult questions having to do with organizational goals, strategic planning, and how to get from mission statement to “mission accomplished.”

ORS Impact’s mission is as plain as the name of the firm. Originally known as Organizational Research Services, ORS Impact’s rebranding provides an updated identity reflective of its long history of delivering data-driven insights the sector needs to move from ideas to impact. ORS Impact moves systems change work forward under the stewardship of a strong Leadership Team, including CEO Sarah Stachowiak, President Jane Reisman, Vice President Lovely Dhillon, and Vice President Marshall Brumer.

The organization has had a strong reputation for project evaluation for the last 25 years which is now complemented with deeper work in defining mission success and supporting organizational learning. Acting as “thought partner” with its clients in a shared duty to achieve social change, ORS Impact has helped to shift the focus of organizations to encompass the difference their work makes in concrete, measureable, and accessible terms.

ORS Impact helps organizations formulate their “theory of change” to make connections between activities, strategies, and outcomes. Whether it’s helping the Annie E. Casey Foundation strengthen its network of state-based child advocates or working with The United Nations to design and implement a results-based approach to budgeting, ORS Impact works to provide clarity on what organizations should be striving to accomplish and the methods they will use to implement and assess their work.

Issues ORS Impact has tackled include early childhood, advocacy and policy change, community development, K-12 education, the environment, public health, and more. Their client partners run the gamut from large foundations to small nonprofits to government agencies – in each case custom designing evaluation and measurement programs.

“As we help organizations create their theory of change, there is always an ‘a-ha moment’ where the team realizes new insight into how their individual activities contributes towards an organizational goal.’ Sarah says. “It’s always our mission to create greater strategic alignment within organizations that will result in better impact.”

“AS WE HELP ORGANIZATIONS CREATE THEIR THEORY OF CHANGE, THERE IS ALWAYS AN ‘A-HA MOMENT’”

ORS Impact’s membership in Independent Sector supports the firm’s efforts as it continues to address the needs of the nonprofit sector. Pointing to the wide range of membership represented and the targeted focus of the programming, ORS Impact shares, “Personally and professionally, we have gained some powerful insights at the Independent Sector national conference.” “As CEO, I constantly need insights for my work as the leader of our firm and with my clients,” says Sarah. The Independent Sector conference, especially C-Suite Sessions, provide that value.”
As part of its Healthy Places Initiative, the foundation partnered with three diverse locales – urban, suburban, and rural (the example above) – to rethink and reengineer the built environment with a focus on health. Changes to streets, buildings, transportation, parks, and bike paths are designed to make it easier, safer, and more appealing to walk, play, and engage in daily activities that encourage movement, connection, and fun. A major cross-cutting concern in all of the foundation’s work is to help reduce obesity, particularly among the state’s youngest residents. “What I am really passionate about is investing in children, to help them place a different value on health,” says Anne. “We want good health to be as cool as video games.”

This is where the Colorado Health Foundation stepped in. Local leaders had the opportunity to see their town’s built environment challenges and potential for greater health through the eyes of a visiting multidisciplinary team of experts with whom they engaged in intense dialogue and analysis. But that wasn’t all. “The end result was not a plan without dollars that would sit on a shelf,” says Anne, the foundation’s president and CEO since 2005. “It came with an investment. The community told us ‘we feel valued.’ It gave them hope.”

In thinking back to her earliest days as chief executive, Anne did not attend the IS conference because she thought it was for grantees. One conference convinced her it was the place to be. “I was so impressed by the mingling of grantees and foundations. It is one of the few places where you can be on an equal playing field, where the power differential is diminished,” she says. “It also was refreshing to hear what nonprofits were doing not just in health but in education, the environment, and arts and culture.”

Dedicated to making Colorado the healthiest state in the nation, the foundation not only encourages healthy living, it also works to increase access to adequate, affordable health insurance and quality, coordinated health care that addresses mental as well as physical health needs. With $2.2 billion in assets, it is the third largest health-related foundation in the nation.

“IT WAS REFRESHING TO HEAR WHAT NONPROFITS WERE DOING NOT JUST IN HEALTH BUT IN EDUCATION, THE ENVIRONMENT, AND ARTS AND CULTURE”
Rand Wentworth
President, Land Trust Alliance

Sometimes a small effort can add up to a much larger one. Rand Wentworth, president of Land Trust Alliance, sees this truth every day as he helps local citizens protect forests, farms, parks, and other “cherished” places across America. “I’m a huge believer in local action,” says Rand. “Given constraints on state and federal budgets, we feel that the way forward is for land trusts to work with private land owners.” Little by little, land trusts are conserving land, but this adds up to 50 million acres – the size of the state of Wisconsin.

Rand is quick to note that, despite their name, land trusts are about people. “It’s a moral imperative that every child have access to the healing qualities of nature,” Rand says.

“ACHIEVING BETTER CONSERVATION RELIES ON GETTING HARDWORKING CITIZENS IN MANY DIFFERENT AREAS TO SPEAK TOGETHER WITH ONE VOICE”

That is why the Alliance is dedicated to pursuing three goals. The first is to increase the pace of conversation (doubling acres conserved from 1 to 2 million per year through federal tax incentives that support the donation of conservation easements and other important policies). Second is enhancing the quality of conservation so that the most important lands are protected with the best practices (including an accreditation process that evolved from Rand’s work with IS and the Panel on the Nonprofit Sector a decade ago). Third, the Alliance’s legal services defend conservation when it is threatened in court.

Rand began his career in commercial real estate right after business school. “I changed sides after ten years, using my real estate knowledge to help preserve land,” he explains. Participation in IS taught him about social entrepreneurship, he says, and that led to new approaches to stand up to “developers who were bent on breaking permanent conservation easements. To address this problem, the Alliance created an innovative 501(n) Charitable Risk Pool to provide low-cost insurance to land trusts to fight developer-instigated legal battles.” Although the initiative is brand new, there are already more than 22,000 properties enrolled.

The Alliance board also is taking the organization to new territory in an effort to achieve win-win results in community health, affordable housing, and job creation. “We can’t just be our own little bubble. We have to reach out and address broader community needs,” Rand says.

“Just as in the nonprofit sector at large, achieving better conservation relies on getting hardworking citizens in many different areas to speak together with one voice.”
Carolyn Woo
President and CEO, Catholic Relief Services

As Carolyn Woo is quick to note, Catholic Relief Services helps people on the basis of need, not creed. Today they number more than 100 million people, with a goal of 150 million in five years. But just as important to Carolyn and her organization is how they are served: through integrated human development. “Food or health care or education alone is not enough,” says Carolyn. “CRS stresses the whole person, family, and community, and the values of peace, social justice, and human dignity. The goal is to help people reach their full potential” – and she has witnessed the impact close up.

“I GET TO LOOK OUT FROM A DIFFERENT WINDOW WITH IS.”

In Afghanistan she met women, who with help from CRS, received business training and a small fund to buy ingredients. They were so successful they sold out their three-month inventory of supplies in just one week. In a quiet corner of the bakery, Carolyn conversed with a woman who was nursing her baby. In past years, the mother had so little to eat that she had lost a child. The baby in her arms represented a new beginning.

A maize farmer she met in Nicaragua had nightmares when the bill collector’s motorcycle drove by, fearing he would confiscate their farm and leave his family with no place to go. CRS taught him to grow papayas, a more lucrative crop. He started a greenhouse to germinate seedlings and he was certified in the use of fertilizer, an expertise he shares at no cost with local farmers. His children? They are pursuing college degrees in agronomy and agricultural economics.

As the official humanitarian and development agency of the Catholic Church, CRS is seeking to engage 10 million U.S. Catholics in a deep understanding of Catholic social teaching and a meaningful involvement with CRS’ work – “Beyond just donating once a year, to include other activities like fair trade, advocacy, or a speakers’ program.” Carolyn herself has long been engaged with the church, attending 1st to 12th grade in a school run by Maryknoll Sisters in Hong Kong. She appreciates that they taught that “the power of love overcomes challenges” along with an extremely rigorous education.

The former dean of the Mendoza College of Business at the University of Notre Dame, Carolyn finds she is well placed to see CRS with a new eye, deal with the changing environment, and experiment with innovative strategies, technology approaches, structures, and systems. IS helps in that respect. Having been introduced to IS by former board member Father Larry Snyder of Catholic Charities USA, Carolyn appreciates what IS has to offer in terms of learning, networking, advocacy, and meeting her fellow CEOs. “You could be working very hard but leading your organization toward a dead end,” she says. “I get to look out from a different window with IS.”
Lisa M. Borders
Chair of The Coca-Cola Foundation and Vice President of Global Community Affairs for The Coca-Cola Company

No matter where you live or the language you speak, The Coca-Cola Company brand rings a bell. The Coca-Cola Foundation is also global and aspires to be the #1 force for sustainable communities. With the strategic priorities of “Water, Women, and Well-Being,” the foundation is tackling three critical issues in 200+ nations worldwide.

“Water is a major concern, it comprises 99 percent of our bodies and 99 percent of our product,” explains Lisa M. Borders, chair of the Foundation. “The company has made a global commitment to put back every drop we use and become water neutral by the year 2020. That is our first priority. Secondly, women are underrepresented and disenfranchised everywhere, yet they are community leaders and tremendous assets. We have pledged to empower five million women through our value chain by 2020. And our third priority is to promote active healthy living in every market where we operate.”

“For our Foundation, we fulfill these commitments by supporting clean water and water conservation efforts like our RAIN initiative in Africa, which will provide access to clean water for 2 million people living on the continent; enabling women through entrepreneurship and economic empowerment efforts and enhancing communities through active healthy living, education and youth development programs.”

The company’s philanthropic commitment has practical roots. “Our company can only be as strong and sustainable as the communities we serve,” says Lisa, while stressing that the company and foundation walk on parallel tracks so as not to mix the commercial with the charitable. She joined the foundation a year ago, just in time to help them celebrate their 30th anniversary of giving back.

Lisa says she is honored to lead Coca-Cola’s philanthropic efforts. Just two months into her job, the US Department of State contacted the foundation about providing assistance to educate young African leaders by bringing them to the U.S. for training, both academic and experiential. “Upon hearing of this request we agreed that, as the largest private employer on the continent, we should be engaged, she says. “However, we asked that our first wave of support target young women leaders and the State Department agreed.”

Lisa is well known to people across the City of Atlanta having served as president of the City Council and Vice Mayor, and held top private sector jobs in the fields of healthcare, community reinvestment and real estate. A brilliant resume and yet the accomplishment she singles out with a smile from those years was having helped bring the Dream, the Women’s National Basketball Association (WNBA) team, to Atlanta. In just six seasons, the Dream has secured two Eastern Conference championships for the city. “Women are following their passions by playing professional sports while also serving as terrific role models,” she notes.

She reminds us The Coca-Cola Foundation has for decades been a close partner of Independent Sector. “IS is like a pebble in the pond gathering up all of the information from the ecosystem and then sending a signal across the pond to the rest of us,” says Lisa. “There is strength in numbers. We benefit so much from your critical thinking, your ability to represent, your conferences, and your trainings, your policy insights and work on impact. It is a privilege to support IS.”
# Statement of Financial Position

As of December 31, 2013

**Assets**

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**Total Assets**  
$45,447,956

**Liabilities and Net Assets**

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**Total Liabilities**  
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**Net Assets**

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**Total Net Assets**  
$30,417,919

**Total Liabilities and Net Assets**  
$45,447,956

Independent Sector’s audited financial statements and IRS Form 990s are posted on the IS website, [http://www.independentsector.org/is_financial_reports](http://www.independentsector.org/is_financial_reports)
## FINANCIALS

### CONSOLIDATED STATEMENT OF ACTIVITIES

**YEAR ENDED DECEMBER 31, 2013**

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<td>Grants and contributions</td>
<td>$2,610,317</td>
<td>$1,122,039</td>
<td>$3,732,356</td>
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<td>Membership contributions</td>
<td>2,802,850</td>
<td>-</td>
<td>2,802,850</td>
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<tr>
<td>Rental income</td>
<td>1,654,341</td>
<td>-</td>
<td>1,654,341</td>
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<tr>
<td>Conference fees</td>
<td>821,420</td>
<td>-</td>
<td>821,420</td>
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<tr>
<td>Interest and dividends</td>
<td>36,498</td>
<td>-</td>
<td>36,498</td>
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<tr>
<td>Publication sales and other</td>
<td>2,413</td>
<td>-</td>
<td>2,413</td>
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<tr>
<td><strong>Net assets released from restrictions:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Satisfaction of program restrictions</td>
<td>1,133,474</td>
<td>(1,133,474)</td>
<td>-</td>
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<tr>
<td>Satisfaction of time restrictions</td>
<td>1,469,813</td>
<td>(1,469,813)</td>
<td>-</td>
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<tr>
<td><strong>TOTAL REVENUE AND SUPPORT</strong></td>
<td>10,531,126</td>
<td>(1,481,248)</td>
<td>9,049,878</td>
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<tr>
<th>EXPENSES</th>
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<tr>
<td>Program Services</td>
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<td>National conference</td>
<td>2,157,233</td>
<td>-</td>
<td>2,157,233</td>
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<td>Public policy and government affairs</td>
<td>1,299,541</td>
<td>-</td>
<td>1,299,541</td>
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<tr>
<td>Networks and member engagement</td>
<td>1,002,956</td>
<td>-</td>
<td>1,002,956</td>
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<tr>
<td>Programs and practice</td>
<td>771,129</td>
<td>-</td>
<td>771,129</td>
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<tr>
<td>Planning and learning</td>
<td>759,147</td>
<td>-</td>
<td>759,147</td>
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<tr>
<td>Communications and marketing</td>
<td>550,696</td>
<td>-</td>
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<td><strong>Total Program Services</strong></td>
<td>6,540,702</td>
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<td>Supporting Services</td>
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<tr>
<td>General and administrative</td>
<td>978,605</td>
<td>-</td>
<td>978,605</td>
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<td>Fundraising</td>
<td>701,688</td>
<td>-</td>
<td>701,688</td>
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<td>Membership development</td>
<td>105,039</td>
<td>-</td>
<td>105,039</td>
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<td><strong>Total Supporting Services</strong></td>
<td>1,785,332</td>
<td>-</td>
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<td>Building Services</td>
<td></td>
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<tr>
<td>Tenant operations</td>
<td>877,027</td>
<td>-</td>
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<tr>
<td>Building operations</td>
<td>431,969</td>
<td>-</td>
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<tr>
<td><strong>Total Building Services</strong></td>
<td>1,308,996</td>
<td>-</td>
<td>1,308,996</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>9,635,030</td>
<td>-</td>
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<tr>
<th>CHANGE IN NET ASSETS FROM OPERATIONS</th>
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<tr>
<td>Grants and Contributions – Fund for IS Leadership</td>
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<td>Net Assets Released – Fund for IS Leadership:</td>
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<td>Released for use in debt reduction</td>
<td>800,000</td>
<td>(800,000)</td>
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<td>Realized and unrealized gain on investments</td>
<td>5,715</td>
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<td>5,715</td>
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<td>Loss on write-off of bond issuance costs</td>
<td>(254,958)</td>
<td>-</td>
<td>(254,958)</td>
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<td><strong>CHANGE IN NET ASSETS</strong></td>
<td>1,446,853</td>
<td>(2,281,248)</td>
<td>(834,395)</td>
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| NET ASSETS, BEGINNING OF YEAR             | 26,042,336   | 5,209,978              | 31,252,314|

| NET ASSETS, END OF YEAR                   | $27,489,189  | $2,928,730             | $30,417,919|
CONTRIBUTORS

As of December 31, 2013

GENERAL SUPPORT FUNDERS

Bill & Melinda Gates Foundation
The California Wellness Foundation
Charles Stewart Mott Foundation
The Coca-Cola Company
The David and Lucile Packard Foundation
The Edna McConnell Clark Foundation
Ford Foundation
Gordon and Betty Moore Foundation
The John D. and Catherine T. MacArthur Foundation
Lumina Foundation

The Lutheran Home Association
Marguerite Casey Foundation
The New York Community Trust
Newman’s Own Foundation
Robert Wood Johnson Foundation
Rockefeller Brothers Fund
Rosenberg Foundation
Surdna Foundation
The Wallace Foundation
W.K. Kellogg Foundation

PROJECT FUNDERS

Advocacy Study Dissemination
Campion Foundation
The Chicago Community Trust

Charting Impact
The William and Flora Hewlett Foundation

Building a Sustainable Future
W.K. Kellogg Foundation

Membership Model
The Rockefeller Foundation
The William and Flora Hewlett Foundation

Financial Security
TIAA-CREF

Redefine Political Activity – Bright Lines Initiative
Anonymous
Casey Family Programs
Joyce Foundation

The Minneapolis Foundation

Save the Charitable Deduction
Casey Family Programs
The Chicago Community Trust
The Cleveland Foundation
Daniels Fund
The Community Foundation of Greater Atlanta
The New York Community Trust
Omidyar Network
The Pittsburgh Foundation
The Saint Paul Foundation
The San Francisco Foundation
Silicon Valley Community Foundation
UN Foundation – Better World Fund

Strategic Planning
Gordon and Betty Moore Foundation

As of December 31, 2013
CONTRIBUTORS

2013 NATIONAL CONFERENCE SPONSORS AND SUPPORTERS

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Ford Foundation
The Rockefeller Foundation
Bloomberg Philanthropies

Distinguished Leader
The New York Community Trust
W.K. Kellogg Foundation*

Leader
Citi Foundation
Rockefeller Brothers Fund

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The NonProfit Times

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The Cleveland Foundation
David and Lucile Packard Foundation
Doris Duke Charitable Foundation
The Edna McConnell Clark Foundation
F.B. Heron Foundation
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The Joyce Foundation**
Prudential Financial, Inc.
Surdna Foundation
United Nations Foundation
The Wallace Foundation
Walmart Foundation

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The Cricket Island Foundation
TIAA-CREF Institute

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Charles H. Revson Foundation

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Altman Foundation*
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The Clark Foundation*
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Washington Council, Ernst & Young
May and Samuel Rudin Family Foundation, Inc.*
William Caspar Graustein Memorial Fund *
.ORG, The Public Interest Registry

* 2013 Conference Scholarship Supporter
** 2013 Arts Programming Supporter

2013 LEADERSHIP SUPPORTERS

2013 John W. Gardner Leadership Award
The William Randolph Hearst Foundations

2013 American Express NGen Leadership Award and the 2013 NGen Fellows Program
American Express Foundation

NGen Preconference Program:
Moving Nonprofit Leaders from Next to Now
Supported in part by Walmart Foundation

CEO Track
Accenture

C-Suite Track
United Nations Foundation

As of December 31, 2013
CONTRIBUTORS

ASSOCIATES

The Associates form a leadership circle of individuals investing in the nonprofit community through personal gifts of $1,000 or more to Independent Sector.

Platinum Associate
Diana Aviv
Robert Briggs
Julie Floch
Irene Hirano Inouye
Michael Piraino
Lorie Slutsky

Gold Associate
Susan Berresford
Stephen Heintz
Risa Lavizzo-Mourey

Silver Associate
Deborah Alvarez-Rodriguez
Ralph Everett

Associate
Amanda Broun
Michael J. Goff
Robert Lynch
Steven McCormick
Bernard Milano
Neil Nicoll
Mariam Noland
Teresa O’Brien
Geoffrey Plague
John Rhodes
Paul Schmitz
Jonathan Small
Kelvin Taketa
Claire Wellington
Richard Williams

ANNUAL FUND

The following individuals supported Independent Sector in 2013.

Cynthia Adcock
Barbara Arnwine
Kyle Caldwell
Edge Research
Erica Greeley
Julia Lopez
Roberto Suro

MATCHING GIFTS

The following organizations increased the giving of other contributors by matching their donations.

AXA Foundation
College Access Foundation of California
EisnerAmper
The Frances L. & Edwin L. Cummings Memorial Fund
Ford Foundation
Kresge Foundation
Rockefeller Brothers Fund
W.K. Kellogg Foundation

As of December 31, 2013
Independent Sector’s collective strength and value depend on active member engagement. That is why in 2013-2014 we developed new ways of growing our numbers and deepening our connections with organizations across the sector. We encourage our members and supporters to help grow the size and diversity of our coalition. IS is stronger with every new voice.

MEMBER PLUS

A growing group of members made voluntary contributions to Independent Sector over and above their dues. These Gold Sustaining Members and Silver Supporting Members give an additional contribution in proportion to their level of base dues.

GOLD LEVEL SUSTAINING MEMBERS

- American Red Cross *
  Washington, DC
- Bill & Melinda Gates Foundation
  Seattle, WA
- The William and Flora Hewlett Foundation
  Menlo Park, CA
- John and Mary R. Markle Foundation
  New York, NY
- Gordon and Betty Moore Foundation
  Palo Alto, CA
- Charles Stewart Mott Foundation *
  Flint, MI
- The New York Community Trust *
  New York, NY
- Fannie E. Rippel Foundation
  Morristown, NJ
- Rockefeller Foundation
  New York, NY
- W.K. Kellogg Foundation
  Battle Creek, MI

SILVER LEVEL SUPPORTING MEMBERS

- Allegany Franciscan Ministries, Inc.
  Palm Harbor, FL
- BBB Wise Giving Alliance
  Arlington, VA
- The Coca-Cola Company
  Atlanta, GA
- William Caspar Graustein Memorial Fund
  Hamden, CT
- McGregor Fund
  Detroit, MI
- Sheffield-Harrold Charitable Trust
  Atlanta, GA
- Xerox Corporation *
  Norwalk, CT

* Charter Member
** New Member in 2013
<table>
<thead>
<tr>
<th>Organization</th>
<th>City, State</th>
</tr>
</thead>
<tbody>
<tr>
<td>.ORG, The Public Interest Registry</td>
<td>Reston, VA</td>
</tr>
<tr>
<td>92Y **</td>
<td>New York, NY</td>
</tr>
<tr>
<td>A.I.R. Harlem **</td>
<td>New York, NY</td>
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<tr>
<td>AARP Foundation</td>
<td>Washington, DC</td>
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<tr>
<td>Accountability Lab **</td>
<td>Washington, DC</td>
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<tr>
<td>AchieveMission **</td>
<td>Oakland, CA</td>
</tr>
<tr>
<td>Achieving the Dream, Inc.</td>
<td>Silver Spring, MD</td>
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<tr>
<td>Action for Healthy Kids **</td>
<td>Chicago, IL</td>
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<td>Actors Fund of America **</td>
<td>New York, NY</td>
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<td>The Advertising Council</td>
<td>New York, NY</td>
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<td>Aga Khan Foundation U.S.A.</td>
<td>Washington, DC</td>
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<td>Alcoa Foundation *</td>
<td>New York, NY</td>
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<tr>
<td>Allegany Franciscan Ministries, Inc.</td>
<td>Palm Harbor, FL</td>
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<tr>
<td>Alliance for Children and Families</td>
<td>Milwaukee, WI</td>
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<td>Alliance for Community Media</td>
<td>Mc Lean, VA</td>
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<tr>
<td>ALSAC, Inc./St. Jude’s Research Hospital</td>
<td>Memphis, TN</td>
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<td>American Alliance of Museums *</td>
<td>Washington, DC</td>
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<td>American Cancer Society *</td>
<td>Atlanta, GA</td>
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<td>American Chemical Society</td>
<td>Washington, DC</td>
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<td>American Diabetes Association</td>
<td>Alexandria, VA</td>
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<td>American Express Company</td>
<td>New York, NY</td>
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<td>American Friends Service Committee</td>
<td>Philadelphia, PA</td>
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<td>American Heart Association *</td>
<td>Dallas, TX</td>
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<td>American Indian College Fund</td>
<td>Denver, CO</td>
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<td>American Red Cross *</td>
<td>Washington, DC</td>
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<td>Americans For Community Development</td>
<td>Granite Springs, NY</td>
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<td>Americans for Indian Opportunity</td>
<td>Albuquerque, NM</td>
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<td>Americans for the Arts *</td>
<td>Washington, DC</td>
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<tr>
<td>America’s Charities</td>
<td>Chantilly, VA</td>
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<td>America’s Promise Alliance</td>
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<td>AmfAR,The Foundation for AIDS Research</td>
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<td>Amnesty International USA **</td>
<td>New York, NY</td>
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<td>Arab Community Center for Economic and Social Services</td>
<td>Dearborn, MI</td>
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<td>Washington, DC</td>
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<td>Arcus Foundation</td>
<td>New York, NY</td>
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<td>Armed Services YMCA of the USA</td>
<td>Alexandria, VA</td>
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<td>ASAE &amp; The Center for Association Leadership</td>
<td>Washington, DC</td>
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<td>Asian Americans Advancing Justice</td>
<td>Washington, DC</td>
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<td>Association For Enterprise Opportunity</td>
<td>Washington, DC</td>
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<tr>
<td>Association for Healthcare Philanthropy</td>
<td>Falls Church, VA</td>
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<td>Association for Research on Nonprofit Organizations &amp; Voluntary Action</td>
<td>Indianapolis, IN</td>
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<td>Association of Advanced Rabbinical &amp; Talmudic Schools</td>
<td>New York, NY</td>
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<td>Association of American Medical Colleges</td>
<td>Washington, DC</td>
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<td>Association of Art Museum Directors</td>
<td>New York, NY</td>
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<td>Association of Direct Response Fundraising Counsel</td>
<td>Washington, DC</td>
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<td>Association of Fundraising Professionals *</td>
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<td>The Association of Junior Leagues International, Inc. *</td>
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<td>Association of Small Foundations</td>
<td>Washington, DC</td>
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<td>The Atlantic Philanthropies</td>
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<td>Atlas Service Corps, Inc.</td>
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<tr>
<td>Axelson Center for Nonprofit Management North Park University</td>
<td>Chicago, IL</td>
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* Charter Member
** New Member in 2013
IS MEMBERS

BBB Wise Giving Alliance
Arlington, VA

S.D. Bechtel, Jr. Foundation
San Francisco, CA

Benevolent **
Evanston, IL

Benton Foundation
Washington, DC

BEST Project
Flint, MI

Big Brothers Big Sisters of America
Philadelphia, PA

Blackbaud, Inc.
Charleston, SC

BoardSource
Washington, DC

The Boston Foundation
Boston, MA

Boy Scouts of America
Irving, TX

Otto Bremer Foundation
Saint Paul, MN

The Bridgespan Group
Boston, MA

Burr, Pilger & Mayer
San Francisco, CA

Bush Foundation
Saint Paul, MN

California Association of Nonprofits
Capitola, CA

The California Endowment
Los Angeles, CA

California HealthCare Foundation
Oakland, CA

The California Wellness Foundation
Woodland Hills, CA

Camp Fire *
Kansas City, MO

Campion Foundation
Seattle, WA

Cancer Care, Inc.
New York, NY

Carnegie Corporation of New York *
New York, NY

The Case Foundation
Washington, DC

Casey Family Programs
Seattle, WA

The Annie E. Casey Foundation
Baltimore, MD

Marguerite Casey Foundation
Seattle, WA

Catalyst Miami
Miami, FL

Catholic Charities USA
Alexandria, VA

Catholic Health Association of the United States
Washington, DC

Catholic Relief Services (CRS)
Baltimore, MD

Committee Encouraging Corporate Philanthropy
New York, NY

Cedarmere Foundation **
Seattle, WA

Center for Community Change
Washington, DC

Center for Creative Leadership
Greensboro, NC

The Center for Effective Philanthropy
Cambridge, MA

Center for Leadership and Civic Engagement, Spelman College
Atlanta, GA

Center for Nonprofit Excellence
Colorado Springs, CO

Center for Public Service, Brown University
Providence, RI

Center For Social Innovation, Graduate School of Social Work at Boston College **
Chestnut Hill, MA

Center for Strategic Philanthropy & Civic Engagement **
Boca Raton, FL

Center for Strategic Philanthropy & Civil Society, Duke University
Durham, NC

Center on Budget and Policy Priorities
Washington, DC

Center on Community Philanthropy Clinton School of Public Service
Little Rock, AR

Centro De Recursos Internacionales Para Organizaciones Civiles, A.C. **
Queretaro, Mexico

Charities Review Council
Saint Paul, MN

Charity Navigator
Glen Rock, NJ

CharityWatch
Chicago, IL

The Chicago Community Trust
Chicago, IL

Chicago Lawyers’ Committee for Civil Rights Under Law
Chicago, IL

Chicago Run **
Chicago, IL

The Children's Trust
Miami, FL

* Charter Member
** New Member in 2013
IS MEMBERS

ChildServe Foundation, Inc. **
Johnston, IA

Church Communities Foundation, Inc.
Rifton, NY

City Year, Inc.
Boston, MA

Edna McConnell Clark Foundation
New York, NY

The Cleveland Foundation *
Cleveland, OH

The Coca-Cola Company
Atlanta, GA

College Access Foundation of California
San Francisco, CA

The Colorado Health Foundation
Denver, CO

Colorado Nonprofit Association
Denver, CO

The Columbus Foundation
Columbus, OH

Common Good Vermont **
Burlington, VT

The Communications Network, Inc.
Naperville, IL

Communities In Schools
Arlington, VA

Community Foundation for Southeast Michigan
Detroit, MI

Community HealthCorps
Bethesda, MD

Community Initiatives
San Francisco, CA

Community Partners
Los Angeles, CA

Community Residences
Chantilly, VA

Congressional Hispanic Caucus Institute, Inc.
Washington, DC

Connecticut Council for Philanthropy
Hartford, CT

Copilevitz & Canter LLC
Kansas City, MO

Council of Michigan Foundations
Grand Haven, MI

Council of New Jersey Grantmakers
Trenton, NJ

Council on Foundations *
Arlington, VA

Cricket Island Foundation
New York, NY

Cuyahoga Arts & Culture
Cleveland, OH

Cystic Fibrosis Foundation
Bethesda, MD

D5 Coalition
Chicago, IL

Deloitte LLP
McLean, VA

Demos: A Network for Ideas and Action
New York, NY

Detroit Riverfront Conservancy
Detroit, MI

Detroit Zoological Society
Royal Oak, MI

Discovering Options
Saint Louis, MO

Gaylord and Dorothy Donnelley Foundation *
Chicago, IL

Donors Forum
Chicago, IL

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Grand Rapids, MI

The Duke Endowment
Charlotte, NC

Doris Duke Charitable Foundation
New York, NY

DuPont
Johnston, IA

Dyson Foundation
Millbrook, NY

Easter Seals
Chicago, IL

EBay Inc.
Washington, DC

Echoing Green
New York, NY

Education-Plus, Inc.
Philadelphia, PA

El Pomar Foundation
Colorado Springs, CO

Emerging Practitioners in Philanthropy
New York, NY

Empire Health Foundation **
Spokane, WA

Encore.org
San Francisco, CA

ERI Economic Research Institute
Baltimore, MD

Everyday Democracy
East Hartford, CT

Falk Foundation
Pittsburgh, PA

Family for Every Child **
London, United Kingdom

Family Independence Initiative
Oakland, CA

* Charter Member
** New Member in 2013
<table>
<thead>
<tr>
<th>IS MEMBERS</th>
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</thead>
<tbody>
<tr>
<td>Family Reunion</td>
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<td>Feed the Children</td>
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<tr>
<td>Feeding America</td>
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<td>The Fetzer Institute, Inc.</td>
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<td>Fidelity Foundation</td>
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<td>Foundation for the Carolinas</td>
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<td>Foundation for the Mid South</td>
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<td>Hibler Franke Foundation</td>
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<td>Lloyd A. Fry Foundation</td>
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<td>Bill &amp; Melinda Gates Foundation</td>
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<td>Gateway Center for Giving</td>
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<td>GE Foundation</td>
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<td>Georgetown University Law Center</td>
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<td>Georgia Center for Nonprofits</td>
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<td>The Wallace Alexander Gerbode Foundation</td>
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<td>J. Paul Getty Trust</td>
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<td>Girl Scouts of the USA</td>
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<td>Girls Incorporated</td>
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<td>Global Impact</td>
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<td>The Good Government Initiative</td>
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<td>Goods for Good, Inc.</td>
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<td>The Grable Foundation</td>
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<td>Grantmakers for Effective Organizations</td>
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<td>Grantmakers Forum of New York</td>
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<td>William Caspar Graustein Memorial Fund</td>
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<td>The Lucile and Robert H. Gries Charity Fund</td>
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<td>GuideStar USA, Inc.</td>
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<td>Walter &amp; Elise Haas Fund</td>
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<td>The Harwood Institute</td>
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<td>Hawai‘i Community Foundation</td>
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<td>The Edward W. Hazen Foundation</td>
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<td>Health Council of South Florida</td>
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<td>The Henry Ford</td>
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<td>F. B. Heron Foundation</td>
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<td>The William and Flora Hewlett Foundation</td>
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* Charter Member
** New Member in 2013
IS MEMBERS

Hispanics in Philanthropy
Oakland, CA

Hope Street Group
Prescott, AZ

Hudson-Webber Foundation
Detroit, MI

The Human Services Council
**
New York, NY

Humanity First, USA
Baltimore, MD

Idaho Nonprofit Center
Boise, ID

Illinois African American Coalition for Prevention
Chicago, IL

Imagine Canada **
Toronto, ON

Imaginer Consulting Limited
London, United Kingdom

Indiana Association of United Ways
Indianapolis, IN

Indiana Grantmakers Alliance
Indianapolis, IN

Indiana University Lilly Family School of Philanthropy
Indianapolis, IN

InsideNGO
Westport, CT

Institute for Community Engagement
Las Cruces, NM

Institute for Nonprofit Education and Research, University of San Diego
San Diego, CA

Institute for Policy and Governance, Virginia Tech
Blacksburg, VA

InterAction
Washington, DC

International Center For Not-For-Profit Law
Washington, DC

International Debate Education Association (IDEA) **
New York, NY

International Institute for Sustained Dialogue
Washington, DC

International Primate Protection League
Summerville, SC

The James Irvine Foundation *
San Francisco, CA

Henry M. Jackson Foundation **
Seattle, WA

The Japan Association of Charitable Organizations
Tokyo, Japan

Jewish Home Lifecare **
New York, NY

The Johnson Foundation, Inc.
Racine, WI

The Robert Wood Johnson Foundation
Princeton, NJ

Joint Center for Political and Economic Studies
Washington, DC

The Joyce Foundation
Chicago, IL

Justice at Stake **
Washington, DC

KaBOOM! Inc.
Washington, DC

Kansas Health Foundation
Wichita, KS

Ewing Marion Kauffman Foundation
Kansas City, MO

Kellogg School of Management, Northwestern University
Evanston, IL

The Kendal Corporation **
Kennett Square, PA

The Kerr Foundation, Inc.
Oklahoma City, OK

Charles F. Kettering Foundation *
Dayton, OH

Kids’ Food Basket
Grand Rapids, MI

KISRA **
Dunbar, WV

John S. and James L. Knight Foundation
Miami, FL

KPMG Foundation
Montvale, NJ

The Kresge Foundation
Troy, MI

Land Trust Alliance
Washington, DC

Lawyers’ Committee for Civil Rights Under Law
Washington, DC

Leadership 18
Alexandria, VA

LeadingAge *
Washington, DC

League of American Orchestras
New York, NY

League of Women Voters of the United States
Washington, DC

Legacy
Washington, DC

The Leighty Foundation
Cascade, CO

Lilly Endowment, Inc. *
Indianapolis, IN

LIVESTRONG
Austin, TX

Living Cities, Inc. **
New York, NY

* Charter Member
** New Member in 2013
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<td>John and Mary R. Markle Foundation</td>
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<td>The McKnight Foundation</td>
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<td>Gordon and Betty Moore Foundation</td>
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<td>Charles Stewart Mott Foundation *</td>
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<td>NAACP</td>
<td>Baltimore, MD</td>
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<td>Carlsbad, CA</td>
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<td>National Academy Foundation</td>
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<td>National Asian Pacific Center on Aging</td>
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<td>National Audubon Society *</td>
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<tr>
<td>National Center for Charitable Statistics, Urban Institute</td>
<td>Washington, DC</td>
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<td>National Center for Family Philanthropy</td>
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<td>National Center on Philanthropy &amp; the Law, New York University School of Law</td>
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<td>National Child Labor Committee</td>
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<td>National Coalition to Abolish the Death Penalty</td>
<td>Washington, DC</td>
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<td>National Committee for Responsive Philanthropy</td>
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<td>National Conference on Citizenship</td>
<td>Washington, DC</td>
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<td>National Council for International Visitors</td>
<td>Washington, DC</td>
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<td>National Council of La Raza *</td>
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<td>National Council of Nonprofits</td>
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<td>National Endowment for Financial Education</td>
<td>Denver, CO</td>
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<td>National Health Council *</td>
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<tr>
<td>National Health Foundation</td>
<td>Los Angeles, CA</td>
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</table>

* Charter Member  ** New Member in 2013
National Human Services Assembly *
Washington, DC

National Institute on Money in State Politics
Helena, MT

National Multiple Sclerosis Society
Washington, DC

National Nursing Centers Consortium
Philadelphia, PA

National Organization for Victim Assistance
Alexandria, VA

National Organizations for Youth Safety
Manassas, VA

National Public Radio
Washington, DC

National State Attorneys General Program, Columbia Law School **
New York, NY

National Urban Fellows, Inc. *
New York, NY

Native American Rights Fund
Boulder, CO

Native Americans in Philanthropy
Minneapolis, MN

The Nature Conservancy *
Arlington, VA

Net Impact **
San Francisco, CA

New Sector Alliance
Boston, MA

The New York Community Trust *
New York, NY

Newman’s Own Foundation, Inc.
Westport, CT

Nonprofit Alliance Kellogg Community College
Battle Creek, MI

Nonprofit and Public Management Center, University of Michigan
Ann Arbor, MI

Nonprofit Center of Northeast Florida
Jacksonville, FL

Nonprofit Coordinating Committee of New York
New York, NY

Nonprofit Leadership Alliance
Kansas City, MO

Nonprofit Network Southwest Washington
Vancouver, WA

The Nonprofit Partnership
Erie, PA

Nonprofit Westchester **
Tarrytown, NY

The Nord Family Foundation
Amherst, OH

Northern California Grantmakers
San Francisco, CA

Northwest Area Foundation *
Saint Paul, MN

NTEN
Portland, OR

NYCharities.org **
New York, NY

Ohio Association of Nonprofit Organizations
Columbus, OH

OneStar Foundation
Austin, TX

Open Society Foundations
New York, NY

OPERA America *
New York, NY

Organizational Research Services
Seattle, WA

The David and Lucile Packard Foundation
Los Altos, CA

PBS Foundation
Arlington, VA

William Penn Foundation
Philadelphia, PA

Pennsylvania Association of Nonprofit Organizations
Harrisburg, PA

Performing Arts Alliance *
Washington, DC

Peter G. Peterson Foundation
New York, NY

The Pew Charitable Trusts
Philadelphia, PA

The Philadelphia Foundation
Philadelphia, PA

Philanthropy for Active Civic Engagement
Washington, DC

Philanthropy Network Greater Philadelphia
Philadelphia, PA

Philanthropy New York
New York, NY

Philanthropy Ohio
Columbus, OH

Phoenix House Development Fund
New York, NY

The Pittsburgh Foundation
Pittsburgh, PA

Points of Light
Atlanta, GA

PolicyBridge
Cleveland, OH

Presidio Institute **
San Francisco, CA

* Charter Member

** New Member in 2013
### IS MEMBERS

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<td>Program on Philanthropy and Social Innovation (PSI) - The Aspen Institute</td>
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<td>Stanford Center on Philanthropy and Civil Society</td>
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<td>STEM Advantage **</td>
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<td>Student Conservation Association *</td>
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Suncoast Hospice Foundation
Clearwater, FL

Surdna Foundation, Inc.
New York, NY

Sustainable Agriculture & Food Systems Funders (SAFSF)
Santa Barbara, CA

Szekely Family Foundation
San Diego, CA

Target
Minneapolis, MN

TIAA-CREF Institute
New York, NY

TIFF Education Foundation **
Cambridge, MA

Transparency International
Berlin, Germany

U.S. Pain Foundation **
Middletown, CT

U.S.-Japan Council
Washington, DC

UJJA Federation of Jewish Philanthropies of New York, Inc.
New York, NY

Union Institute & University
Cincinnati, OH

The Union North America **
New York, NY

United Cerebral Palsy
Washington, DC

United Charitable Programs
Falls Church, VA

United Leukodystrophy Foundation
Dekalb, IL

United Nations Foundation
Washington, DC

United Negro College Fund *
Washington, DC

United States Fund for UNICEF*
New York, NY

United Way of Brevard County, Inc.
Cocoa, FL

United Way of New York City
New York, NY

United Way Worldwide *
Alexandria, VA

United Ways of California
South Pasadena, CA

The Viscardi Center **
Albertson, NY

VisionServe Alliance
Saint Louis, MO

VolunteerMatch
San Francisco, CA

Volunteers of America *
Alexandria, VA

W.K. Kellogg Foundation
Battle Creek, MI

The Wallace Foundation
New York, NY

Walmart Foundation
Bentonville, AR

Washington Nonprofits
Olympia, WA

Larned A. Waterman Iowa Nonprofit Resource Center
Iowa City, IA

Women’s Policy, Inc.
Washington, DC

Robert W. Woodruff Foundation
Atlanta, GA

Xerox Corporation *
Norwalk, CT

YMCA of Central Florida
Orlando, FL

YMCA of Greater Boston
Boston, MA

YMCA of Greater Charlotte
Charlotte, NC

YMCA of Greater New York **
New York, NY

YMCA of Metropolitan Dallas
Dallas, TX

YMCA of Middle Tennessee
Nashville, TN

YMCA of the Greater Houston
Houston, TX

YMCA of the USA *
Chicago, IL

YMCA Retirement Fund
New York, NY

Young Nonprofit Professionals Network
Oakland, CA

Youth for Understanding USA **
Bethesda, MD

YouthBuild USA
Somerville, MA

As of December 31, 2013

* Charter Member
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Azavea **  
Philadelphia, PA

Benevon  
Seattle, WA

The Brico Fund  
Milwaukee, WI

Brighter Strategies **  
Fairfax, VA

CDW  
Vernon Hills, IL

Community Counselling Service Co., LLC (CCS)  
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Community Wealth Partners  
Washington, DC

Danosky & Associates **  
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Chicago, IL

DRG Executive Search Consultants  
New York, NY

Eastern Market Corporation  
Detroit, MI

EisnerAmper LLP  
New York, NY

Flourish Talent Management Solutions, LLC  
Chevy Chase, MD

Foundation Source, Inc.  
Fairfield, CT

Freeman Philanthropic Services, LLC  
New York, NY

GiveGab **  
Ithaca, NY

GivingWorks Inc. **  
Falls Church, VA

La Piana Consulting  
Emeryville, CA

Morgan, Lewis & Bockius LLP  
Washington, DC

NEO Law Group **  
San Francisco, CA

ORS Impact  
Seattle, WA

Pannone Lopes Devereaux & West LLC  
Providence, RI

Pat Read Consulting  
Boulder, CO

Red Rooster Group **  
New York, NY

Ropes & Gray LLP  
Washington, DC

Sagawa/Jospin  
Chevy Chase, MD

Spectrum Nonprofit Services, LLC **  
Milwaukee, WI

Transition Leadership International  
Washington, DC

Van Scyoc Associates  
Washington, DC

* Charter Member

** New Member in 2013
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Terri O’Brien
Chief Operating Officer
Habib Bako
Executive Assistant
Gina Catedrilla Strickland
Director, Office of the President

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Xion Lester
Associate, Governance and Special Projects
Jeffrey Moore
Senior Director, Special Projects and Strategic Initiatives

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Pam Bowman
Director, Government Relations
Allison Grayson
Director, Policy Development and Analysis
Laura Lattimer
Government Relations Assistant
Sarah Perz
Senior Government Relations Representative
Rebecca Yucic
Community Outreach and Advocacy Engagement Assistant

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Troy Adkins
Director, Networks and Member Engagement
Lindsay Grimes
Associate, Member Engagement
Ryan Murphy
Assistant, Member Engagement
Elyse Sherman
Manager, Data and Analysis
Stefon Valencia
Senior Associate, Networks and Member Engagement

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Liza Avruch
Associate, Convenings and Knowledge Sharing
Liz Culkin
Director, Conference and Event Management

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Kendall Joyner
Director, Programs and Practice
Marie LeBlanc
Associate, Programs and Practice
Pickett Slater Harrington
Manager, Programs and Practice

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Christian Clansky
Director of Marketing
Susan Drake Swift
Editorial Director and Grant Writer
Blake Warenik
Online Communications and Media Relations Manager
Ashton Wingate
Communications and Marketing Assistant

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Senior Vice President and Chief Development Officer
Jennifer Chapman
Development Assistant
Matt Perdoni
Director of Business Development
Andrew Williams
Manager, Resource Development and Conference Support

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Accounting Manager
Tyrone Brown
Office Services Coordinator
Danielle T. Maxwell
Director, Talent Management and Administration
Sarah Mbaya
Associate, Human Resources and Finance
Carolyn Mollen
Director, Finance and Accounting
Monique Riviere
Project Director, Database and IT

As of April 15, 2014