

RISING TO THE CHALLENGE

ANNUAL REPORT 2021

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ABOUT INDEPENDENT SECTOR

Independent Sector is the only national membership organization that brings together a diverse community of changemakers, nonprofits, foundations, and corporations working to strengthen civil society and ensure all people in the United States thrive.

As the vital meeting ground, we advance our mission by fostering a sense of belonging, catalyzing action, and providing policy leadership across the full breadth of the charitable sector.

Our organizational strategies are resultscentered and racial equity-focused. We believe the country's charitable nonprofits and foundations should be healthy and equitable, and have a targeted focus on Native, Black, Latinx, Asian, and other communities of color.

OUR STRATEGIC DRIVERS



COMMUNITY BUILDING

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



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



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

MESSAGE

FROM OUR CHAIR AND PRESIDENT

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

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

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

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

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

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

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

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

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

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

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

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

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

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



Fred Blackwell Chair



Daniel J. Cardinali President and CEO

HIGHLIGHTS

AND ACCOMPLISHMENTS

February 2021

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

June 2021

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

May 2021

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





April 2021

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

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

July 2021

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

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

October 2021

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

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

August 2021

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

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

November 2021

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



September 2021

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

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

December 2021

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

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

INDEPENDENT SECTOR

BY THE NUMBERS



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



PEOPLE registered for Upswell Events



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



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



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



IS MEMBER ORGANIZATIONS



764,548

TOTAL WEBSITE PAGE VIEWS



57,486

TOTAL SOCIAL MEDIA FOLLOWERS



1,834,812

SOCIAL MEDIA IMPRESSIONS

FINANCIALS

Independent Sector financials are pending an official financial audit scheduled for Summer 2022. This report will be republished with this information when it is available.

2021 BOARD OF DIRECTORS

AND COMMITTEE MEMBERS

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Former CEO

Dogwood Health Trust

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Stanford Center on Philanthropy & Civil Society

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Founder

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President & CEO

OneStar Foundation

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Co-Founder and Principal Burnam | Gray

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Service Year Alliance

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Do Good Institute

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Jim Clark

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Nicole Anderson

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Ron Kagan

Sarah Kastelic

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Abilities Dance Incorporated

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Accenture

ACCESS

AB Charities

Air Force Association

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American Cancer Society

American Council of the Blind

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American Heart Association

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Engineering Society

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America's Promise Alliance

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Talmudic Schools

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Association of Children's Museums

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BBB Wise Giving Alliance

BellXcel

Better Youth Inc.

Big Brothers Big Sisters of America

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Blackbaud, Inc.

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City Year, Inc.

Code Nation

Code the Dream

Cognitive Toybox Inc.

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Commit2Dallas

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Communities In Schools

Communities In Schools of Mid America,

Community Action Partnership

Community Foundation for Southeast

Michigan

Community Partners

Community Resource Center

Community Wealth Partners

Congregación León de Judá, Leadership

Foundation of Boston

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Connect Detroit

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Justice Journey Alliance, Leadership

Foundation of Chicago

Juvenile Diabetes Research Foundation

International KABOOM! Inc.

Kellogg School of Management, Northwestern University Knoxville Leadership Foundation

KPMG Foundation La Piana Consulting LA Promise Fund

Lane Leadership Foundation

Larned A. Waterman Iowa Nonprofit Resource Center, University of Iowa

Leadership 18

Leadership Education for Asian Pacifics

Leadership Foundations

League of American Orchestras

League of Women Voters of the United

States

Learn Fresh Education Co

Lewiston Leadership Foundation: The Root

Lexington Leadership Foundation

Lilly Endowment, Inc.

Lincoln Center for the Performing Arts

Literacy Lab

Lloyd A. Fry Foundation Love Beyond Walls LULAC Institute, Inc. Lumina Foundation

Lutheran Services in America, Inc.

Lyda Hill Foundation MacPhail Center for Music

ManifestWorks

March of Dimes Foundation Marguerite Casey Foundation Marin Community Foundation

Maryland Nonprofits

Maryland Philanthropy Network Massachusetts Nonprofit Network

Max M. & Marjorie S. Fisher Foundation

Massachusetts Voter Table

McCormick Group McGregor Fund

Memphis Leadership Foundation

MENTOR

Metro Atlanta Leadership Foundation

Miami Valley Leadership Foundation Michigan Nonprofit Association Military Child Education Coalition

MindRight Inc

Minneapolis Leadership Foundation Urban

Ventures

Minnesota Alliance for Volunteer

Administration

Minnesota Council of Nonprofits Mississippi Alliance of Nonprofits and

Philanthropy

Momentum Nonprofit Partners Morgan, Lewis & Bockius LLP

Morino Institute Mouse Inc.

Ms. Foundation for Women Museum of Science, Boston

NAMM Foundation

National Academy Foundation

National Association of Free & Charitable

Clinics

National Audubon Society

National Center for Family Philanthropy National Center on Philanthropy and the

Law, New York University School of Law National Committee for Responsive

Philanthropy

National Geographic Society National Health Council

National Indian Child Welfare Association

National Multiple Sclerosis Society

National Philanthropic Trust

National Urban Indian Family Coalition

National Urban League Native American Rights Fund Native Americans in Philanthropy

Native Ways Federation

NEO Law Group

Network for Teaching Entrepreneurship

New Profit Inc.

Next Chapter Ministries, Leadership

Foundation of Rochester Nonprofit Association of Oregon

Nonprofit Center of Northeast Florida

Nonprofit HR

Nonprofit Leadership Alliance Nonprofit Lifecycles Institute

North Texas Food Bank

NorthEast Ohio Leadership Foundation

Northwest Area Foundation

NPower

NY Funders Alliance

Ohio Assn of Nonprofit Organizations One by One Leadership Foundation

One Hope United **OneStar Foundation** Open Society Foundations

Otto Bremer Trust

Out Teach

Parkview Legacy Foundation

Paul Quinn College PayPal Inc. Per Scholas, Inc.

Performing Arts Alliance Persistent Productions Peter G. Peterson Foundation Philadelphia Bar Foundation

Philadelphia Leadership Foundation Philanthropy for Active Civic Engagement

Philanthropy Southwest Philanthropy West Virginia, Inc.

Pillars Fund

Pittsburgh Leadership Foundation Playworks Education Energized

Plenty

PLUS ME Project Poder Latinx PolicyLink

Portland Leadership Foundation Program on Philanthropy and Social Innovation (PSI) - The Aspen Institute

ProInspire

Project GRAD Houston Prosperity Now Proyecto Pastoral Raikes Foundation Rainwater Foundation Reality Changers Reel Works

ReFrame Association

Regents of the University of California Reinvigorating the Conversation: Volunteerism, Service-Learning and

Community Engagement Roadtrip Nation LTD Rockefeller Brothers Fund Rockefeller Foundation

RSVP Volunteers in Service Running Strong for American Indian Youth

Salem Leadership Foundation Sall Family Foundation San Francisco Foundation

Savannah Leadership Foundation School of Professional Studies, Columbia Scratch Foundation Seattle Foundation

University

SER Jobs for Progress National, Inc.

Service Year Alliance

SETDA

Share Our Strength Shelter Music Boston Sidekick Education Inc. Skillman Foundation Skoll Foundation

Slingshot Development Fund Smart Development Inc.

Social Current

Social Innovation Forum

Sojourners

South Texas College

Southeastern Council of Foundations Southern California Grantmakers Southern Poverty Law Center Spectrum Nonprofit Services, LLC

Sphinx Organization Springboard Collaborative Springboard Partners

Stanford Center on Philanthropy and Civil

Society

State Fair of Texas

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The Andrew W. Mellon Foundation The Annie E. Casey Foundation

The Appellate Project

The Association of Junior Leagues

International, Inc.

The Boone Family Foundation

The Bridgespan Group The California Endowment

The California Wellness Foundation

The Center for Community Transformation,

Leadership Foundation of Fresno The Center for Effective Philanthropy

The Chicago Community Trust The Cleveland Foundation

The Colorado Health Foundation The Columbus Foundation

The Communications Network, Inc.

The Corps Network The Dancing Diplomat

The David and Lucile Packard Foundation

The Dibble Institute The Fetzer Institute, Inc. The Ford Foundation

The George Gund Foundation The Greater Sum Foundation The Heinz Endowments

The Henry Ford

The Japan Association of Charitable

Organizations

The John D. and Catherine T. MacArthur

Foundation

The Joyce Foundation The Kerr Foundation, Inc. The Kresge Foundation

The League of California Community

Foundations

The Libra Foundation

The Longbrake Family Foundation

The Nature Conservancy The New York Community Trust

The Nonprofit Council The Oasis Institute

The Pew Charitable Trusts The Philadelphia Foundation The Policy Academies

The Ralph C. Wilson Jr. Foundation The Robert Wood Johnson Foundation The Salvation Army National Headquarters

The Sierra Club Foundation The Spencer Foundation The St. Bernard Project

The Trevor Project The Viscardi Center The Wallace Foundation The Walton Family Foundation

The William and Flora Hewlett Foundation

The Y In Central Maryland The Young Latino Network

Thrive Collective, Leadership Foundation

of New York Timecounts

Tipping Point Community

Towers of Hope, Leadership Foundation of

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Transform Scott County, Leadership Foundation of Georgetown Transition Leadership International Tribal Youth Resource Center TruEvolution

Trust for America's Health

Truth Initiative

Tshwane Leadership Foundation

U.S. Dream Academy U.S.-Japan Council

uAspire

Ubuntu Leadership Institute

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United Philanthropy Forum United States Fund for UNICEF United Way of Anchorage

United Way of Greater Chattanooga United Way of Greenville County

United Way of Texas

United Way of the Piedmont United Way Worldwide

University of Oklahoma Foundation Inc

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Upbring

Upwardly Global Urban Alliance

Urban Arts Partnership

Urban Institute Center on Nonprofits and

Philanthropy

Urban Teacher Center

USC Equity Research Institute

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Leadership

Veterans in Media and Entertainment

VisionServe Alliance Voice for Adoption VolunteerMatch Volunteers of America W.K. Kellogg Foundation

Walmart

Washington Nonprofits

Weill Institute of Music - Carnegie Hall

Weird Enough Productions

Welcome Project

West Virginia Leadership Foundation: New

Vision

William Randolph Hearst Foundations Wilmington Area Leadership Foundation

YMCA of Greater New York YMCA of Metropolitan Dallas

YMCA of the USA YMCA Retirement Fund Young Invincibles

Young Storytellers Foundation Yuvalok Leadership Foundation YWCA Greater Pittsburgh YWCA National Capital Area

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as of June 2022

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