

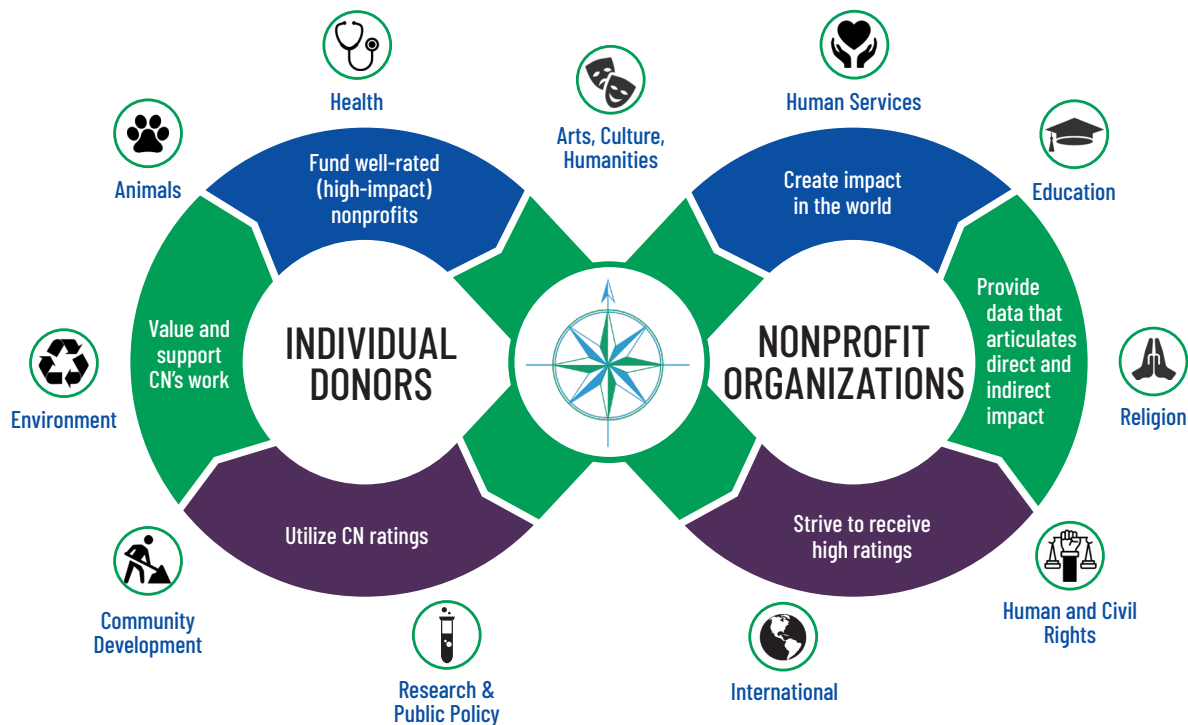
FIVE-YEAR STRATEGIC PLAN 2026



MISSION MAKE IMPACTFUL GIVING EASIER FOR ALL

NORTH STAR THE NUMBER OF UNIQUE INDIVIDUALS USING CN'S GUIDANCE

VISION GIVING IS INCLUSIVE, EFFECTIVE, AND ABUNDANT – DRIVING GREATER IMPACT FOR CAUSES PEOPLE CARE ABOUT



MOON SHOT GUIDE A TRILLION DOLLARS OF GIVING TOWARD BETTER OUTCOMES

VALUES

LEADERSHIP

We dream big and strive toward making the seemingly impossible possible, lifting the sector as we go.

COLLABORATION

We collaborate internally and externally to accelerate our work and achieve more together.

EQUITY

We stand for equity, diversity, and inclusion within our organization and through our evaluations and guidance.

FAIRNESS

We assume good intent, leading with trust within our organization and through our work to catalyze giving wherever there is need.

USEFULNESS

We provide fair, transparent evaluations, and valuable tools to enable a diverse set of donors to find and support an ever-greater number of nonprofits they can trust.

IMPACT!

As more donors use CN's ratings and guidance, they will have a deeper **impact** on the world's toughest problems.

By constantly improving its **ratings**, CN will dramatically increase its influence on charitable giving.

CN's **team** and **platform** in turn develop ratings to inform donors and their giving.

Revenues provide the base for all of CN's work, supporting both its people and technology platform.

STRATEGIES

REACH Grow the number of unique individuals using CN's guidance to inform their giving

- Increase the number of unique individuals using CN's guidance, whether on CN's website or elsewhere, and measure the extent to which overall individual giving is influenced by it.
- Refresh the brand and website experience to attract larger audiences to CN, and develop tools to help these visitors serve as evangelists of CN's work.
- Build and promote a new API to better meet donors where they make giving decisions (workplaces, DAFs, and social media). Explore opportunities to market and bundle CN's API along with API services from other organizations.
- Focus on typical donors as the core customer, and change UI to amplify the use of CN's ratings and guidance.
- Touch the hearts of donors with inspirational stories of donors supporting nonprofits having significant impact.

RATINGS Provide individual donors with more in-depth and intuitive guidance

- Continue expanding Encompass to improve nonprofit performance, and meet users where they are.
- Rate more organizations (across all Encompass beacons) including smaller nonprofits.
- Fully integrate the Encompass and Star Ratings systems.
- Expand and improve high-volume entry points to CN's site such as the Advisory System, Hot Topics, and curated lists.

TEAM Support and develop CN team to achieve even greater results

- Hire additional staff to expand competencies in areas such as business development, ratings, fundraising, design, and other guidance.
- Raise DEI competency by establishing a DEI plan, hiring diverse candidates and building additional staff engagement on the topic.
- Develop additional systems that enable CN's board members to perform at their highest level in helping CN pursue its mission.

PLATFORM Improve technology to provide users with the best possible experience

- Improve search and filtering technology so donors can more easily find nonprofits that match their interests, such as intersecting demographic information or combining data-sets, (CDC regional need-based metrics)
- Modernize technology stack and use state of the art tools (CRM, CMS).

REVENUE Strengthen revenue engine with a multi-pronged approach

- Garner large capacity-building grants to take on major improvements (such as expanding filtering, building new API, creating Needs Based Discovery Tool).
- Further monetize Giving Basket, and convert more of those who are already using CN guidance (such as millennials) into CN donors without alienating core users.
- Develop business plan for potential earned revenue opportunities, such as the new API and customized research.