

The Course to 2030

Serving Donors Wherever They Are

Objective

The Charity Navigator 2027-2029 strategic framework centers our mission to make impactful giving easier for all, anchored in the imperative to meet donors wherever they are giving. We want to meaningfully contribute to reversing the downward trend in charitable giving among U.S. households by fostering trust and connection into philanthropy. Our progress will be guided by a Northstar Metric: growing the number of people acting on Charity Navigator's guidance and resources. We aim to do this while AI is reshaping the philanthropic landscape and how people think about giving shifts. This strategy positions Charity Navigator to capitalize on its infrastructure role and strong set of ratings & assets, ensuring our resources remain the definitive trusted authority for donors in a digital-first era.

Core Audience

Our core audience consists primarily of everyday individuals and resource-limited institutions who approach their philanthropy with a "do-it-yourself" mindset and aim to make informed giving decisions. These donors seek trustworthy, relevant and actionable insights to guide their contributions. Furthermore, we believe that our core audience is defined by a distinct identity, bringing both purposefulness and connection to their charitable actions.

Pillars of Action



LEVERAGE CORE ASSETS, INTELLIGENTLY USE AI
AND IMPROVE FINANCIAL SUSTAINABILITY



MISSION

Make Impactful Giving
Easier For All



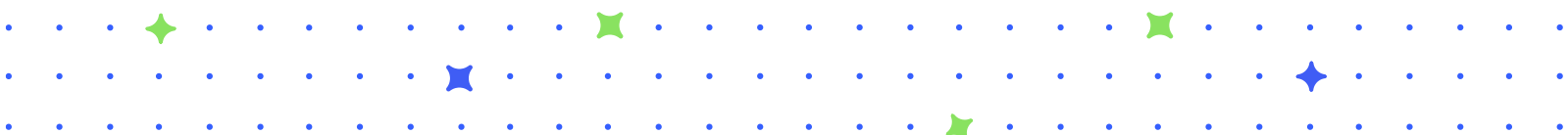
VALUES

Leadership
Collaboration
Equity
Fairness
Usefulness



NORTHSTAR

Grow the number of individuals
who act on Charity Navigator's
guidance and resources.



Pillars of Action

Charity Navigator's Guidance is Everywhere

Ensure our assets (ratings, alerts, guidance) and information are wherever our primary audience is making charitable decisions.

Actions:

- Create innovative off-platform solutions, including Artificial Intelligence (AI) -driven giving agents and Model Context Protocol (MCP) integrations of Charity Navigator's data, to provide robust philanthropic guidance wherever donors are active. Actively market and sell them to potential new audiences.
- Ensure large language models (LLMs) can easily access our information and that it displays it accurately and with adequate attribution.
- Continuously evolve and refine our suite of Application Programming Interface (API) products to effectively address the dynamic requirements of potential partners and customers.
- Build partnerships with both AI companies and giving platforms to expand our reach by ensuring that our ratings/assets are accessible and integrated.

KPIs

- 1 Increase the number of off platform instances or implementations of Charity Navigator's assets.
- 2 Increase the number of unique users seeing Charity Navigator guidance to guide their decision-making off-platform.
- 3 Increase the number of partnerships leveraging Charity Navigator resources and increasing our visibility.

User/Donor Centric Experience

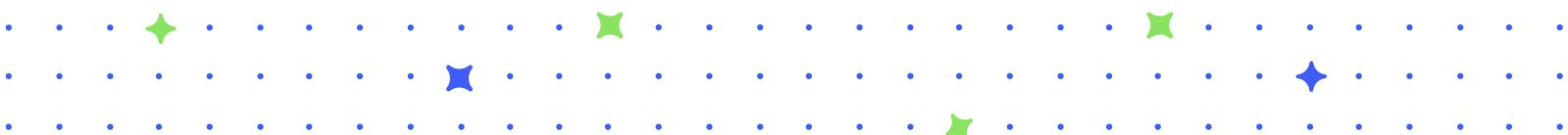
Create a user-centric set of personalizable or tailored giving tools that enables informed giving and increases brand loyalty.

Actions:

- Develop a foundational suite of tailored giving insights and tools designed to delight users, such as progress and impact reporting for "favorited" or supported charities, comparative features, bespoke recommendations, streamlined one-click tax reports and/or AI-driven conversational agents. Our goal is to make these users champions of Charity Navigator's value and usefulness.
- Validate these features through user testing while exploring expansion to new platforms with new audiences.

KPIs

- 1 Increase the number of return users who use our guidance (on and off platform).
- 2 Increase the net promoter score of logged in users.
- 3 Increase aided brand awareness.



Enablers: Asset Leverage, AI, and Sustainability

Promote Assets and Brand

Our ratings, alerts, recommendations and guidance are the trustmarkers that enable informed giving. We will leverage the robust foundation of these core assets to create new, donor-centric products and functionality that foster informed giving, while continuing to maintain and grow their quality and reach.

Actions:

- Develop user-centric products and actionable insights that advance the objectives of Pillars 1 and 2 based on existing Charity Navigator assets.
- Maintain and expand the depth and accuracy of the Encompass Rating System, alerts, recommendations and guidance.
- Leverage Charity Navigator's position to increase thought leadership, providing insights from our data that informs the general public and overall giving. eco-system.

KPIs

- 1 Increase the number of nonprofits with a complete rating.
- 2 Increase new features and products that increase generosity, drive brand loyalty and delight our users.

AI-Forward Products and Infrastructure

Donors expect AI-driven specificity and intelligence in their giving experience. Charity Navigator will adopt an AI-forward approach to ensure our data is discoverable by large language models (LLMs), and use new technologies like MCP servers and Agents for robust on- and off-platform guidance. We will continue to look for additional ways to use AI to drive internal organizational efficiency through AI automation and the adoption of AI tools where appropriate.

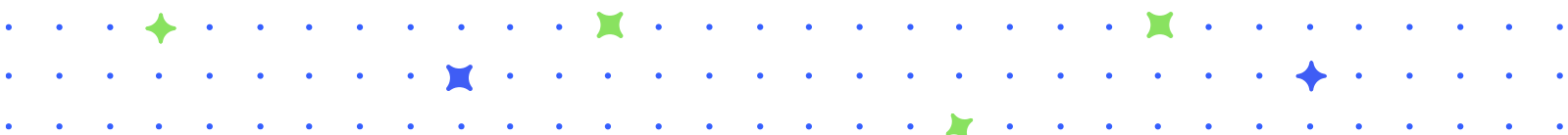
This will require establishing an infrastructure that can leverage AI while keeping a human in the loop approach that ensures the fidelity and trustworthiness of our products.

Actions:

- Optimize website content and establish strategic collaborations with commercial LLM providers to maximize the discoverability of our guidance within AI-driven conversational results.
- Procure or develop the robust technical infrastructure and advanced technologies necessary to power a sophisticated suite of AI-driven, donor-facing tools.
- Leverage AI to increase productivity across critical operations, specifically targeting advancements in rating production, engineering workflows and marketing outreach.

KPIs

- 1 Grow the number of Charity Navigator mentions in LLMs based on third party tracking.
- 2 Increase the number of AI-powered products that measurably drive donor loyalty, engagement and/or generosity.



Grow Revenue to Promote Sustainability

Our current revenue relies on website users (79%) and foundations (21%). Sustained growth necessitates a more diversified revenue model with earned revenue, and a deliberate focus creating mission-aligned products. To ensure Charity Navigator's long-term sustainability and growth, Charity Navigator will prioritize the productization of our data and assets to develop earned revenue streams that meaningfully complements our traditional revenue model, specifically our API, an MCP, Where to Give Now Lists, Corporate Social Responsibility-focused & other customer-driven products. We will also bolster our traditional revenue model by creating an experience that delights users, inspiring them to give and give more.

Actions:

- Leverage user-centric tools to increase the number of loyal supporters.
- Strengthen and grow relationships with institutions and foundations see Charity Navigator as an indispensable component of philanthropic infrastructure.
- Cultivate and expand the following earned revenue streams through asset productization:
 - Develop and market sophisticated API and MCP-based products.
 - Provide high-value data and actionable insights to corporations for Corporate Social Responsibility and philanthropic initiatives.
 - Explore valuable nonprofit-facing products and services that may create a new revenue stream.
 - Develop other products based on nonprofit and user demand.

KPIs

- 1 Growth in Annual Total Revenue. (minimum 5% annually)
- 2 Increase Earned Revenue Percent of Total Revenue. (5% of total revenue by end of FY29)
- 3 Increase in number of active supporters of Charity Navigator.
- 4 Increase the number of repeat donors to Charity Navigator.

