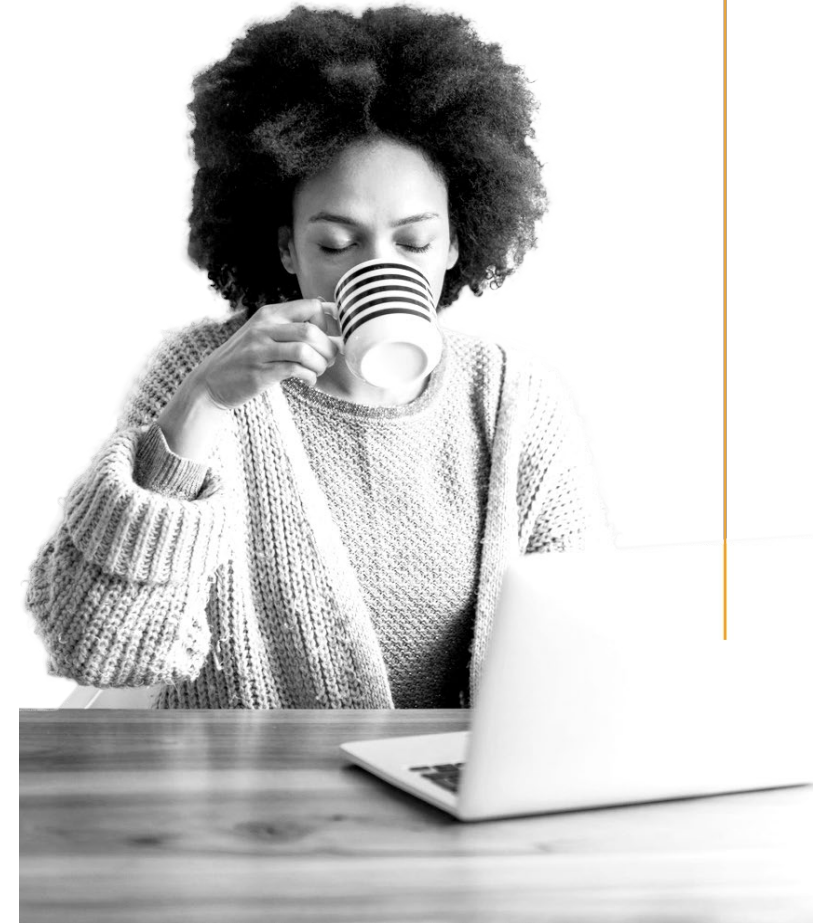


Welcome

We'll be getting started promptly!
In the meantime, feel free to reach out via Chat. Tell us your name and organization!

Get comfortable
and ready to learn!



Fundraising During Uncertain Times

February 23, 2022

Yes, we are recording today's presentation.

You will receive a link to the recording via email in the next 48 hours.



Nice to meet you



Krista Berry Ortega

Network Engagement Manager

Pronouns: she/her/hers



Dave Holmes

Network Engagement Manager

Pronouns: he/him/his

Candid.

What we do

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where that money comes from, where it goes, and why it matters. Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Candid value

We're **accessible.**

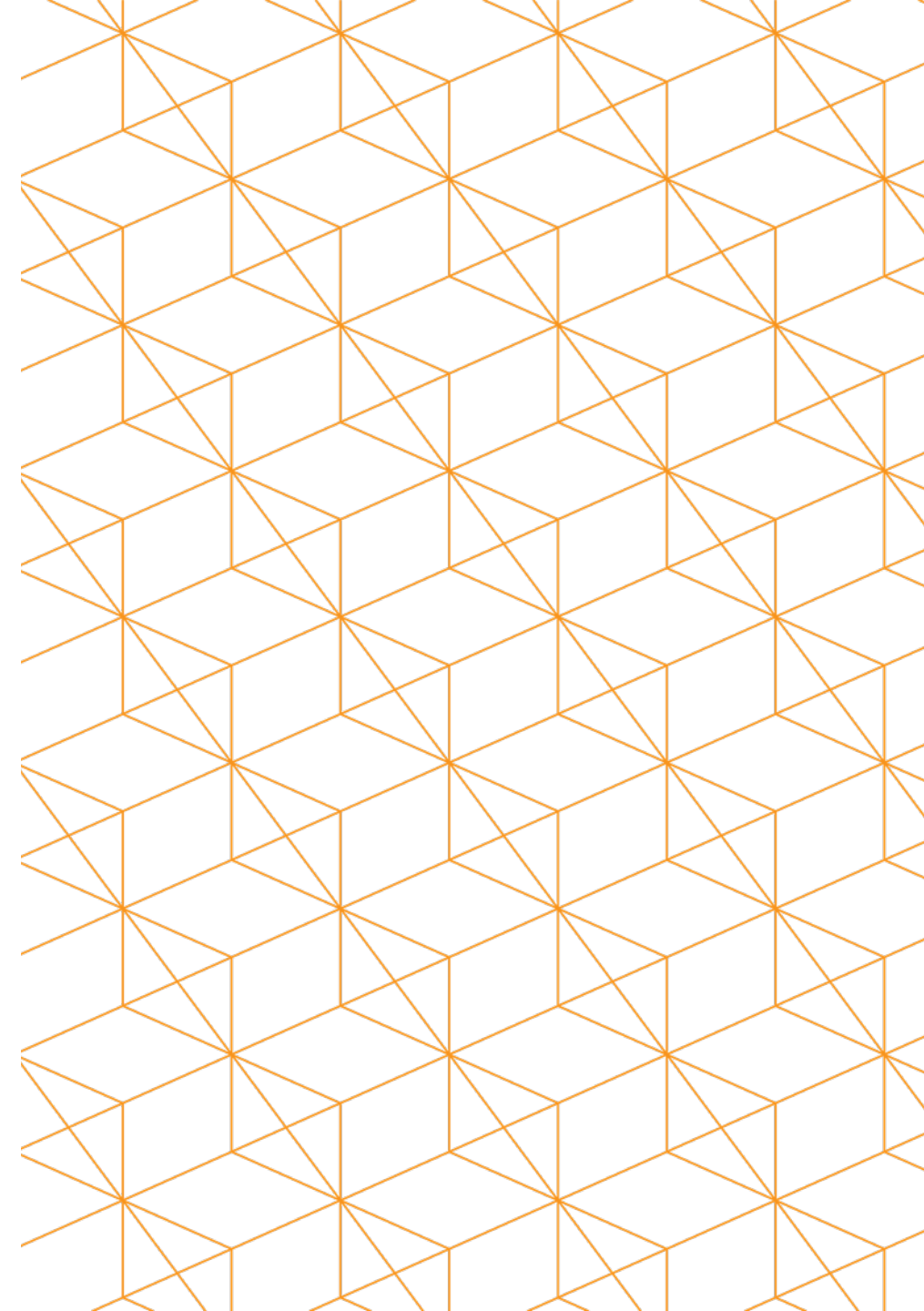
We ask, “How can we help?”
and we mean it.



Thank you!

Thanks to San Manuel Band of Mission Indians!

Grounding moment



Upon completion of this training, you should be able to:

- Identify free and fee-based tools for discovering potential funding opportunities that align with your mission
- Summarize best practices in building relationships with funders and writing grant proposals during a crisis
- Describe how the information from your Candid Nonprofit Profile on GuideStar informs potential donors and funders and powers 200+ charitable sites



Poll. Select all that are true:

Since March 2020...

- Nothing has changed
- We have had to reduce services
- We have had to increase services to meet the demand
- We have had to reduce staff
- We have had a loss in income
- We have had to fundraise more
- We have had leadership change

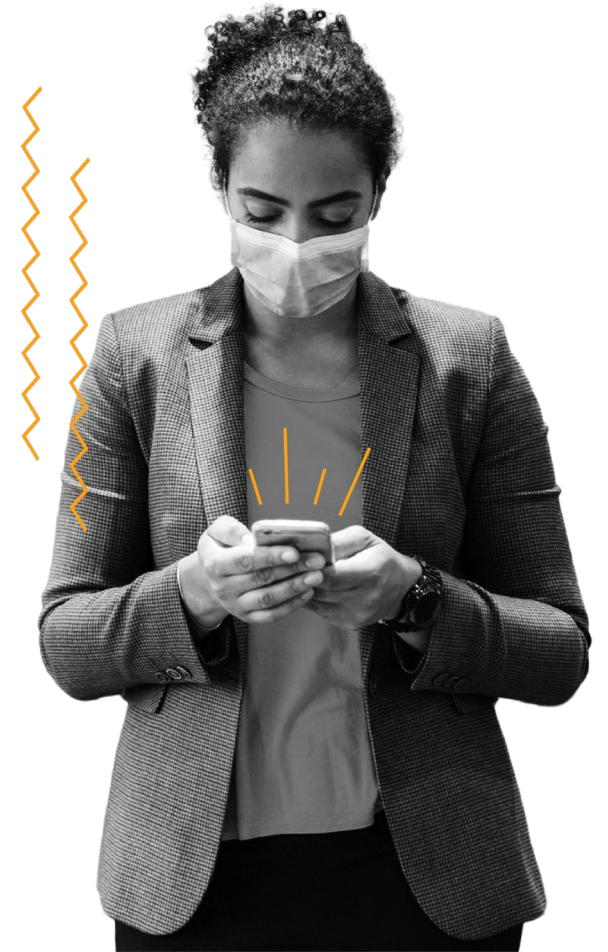


Our response to global events

Thank you for being a part of Candid's learning community. We recognize that this may be a challenging time for many. Candid has shifted its key learning opportunities to a virtual format, and you can check them out at bit.ly/CandidLearningOnline. We've also invested in providing the social sector with the resources they need to make informed decisions about today's most pressing issues:

Learn more about COVID-19 resources at:
bit.ly/CandidCoronavirus

Learn more about racial equity resources at:
bit.ly/CandidRacialEquity



Quick tour of our pop-up pages

bit.ly/CandidCoronavirus

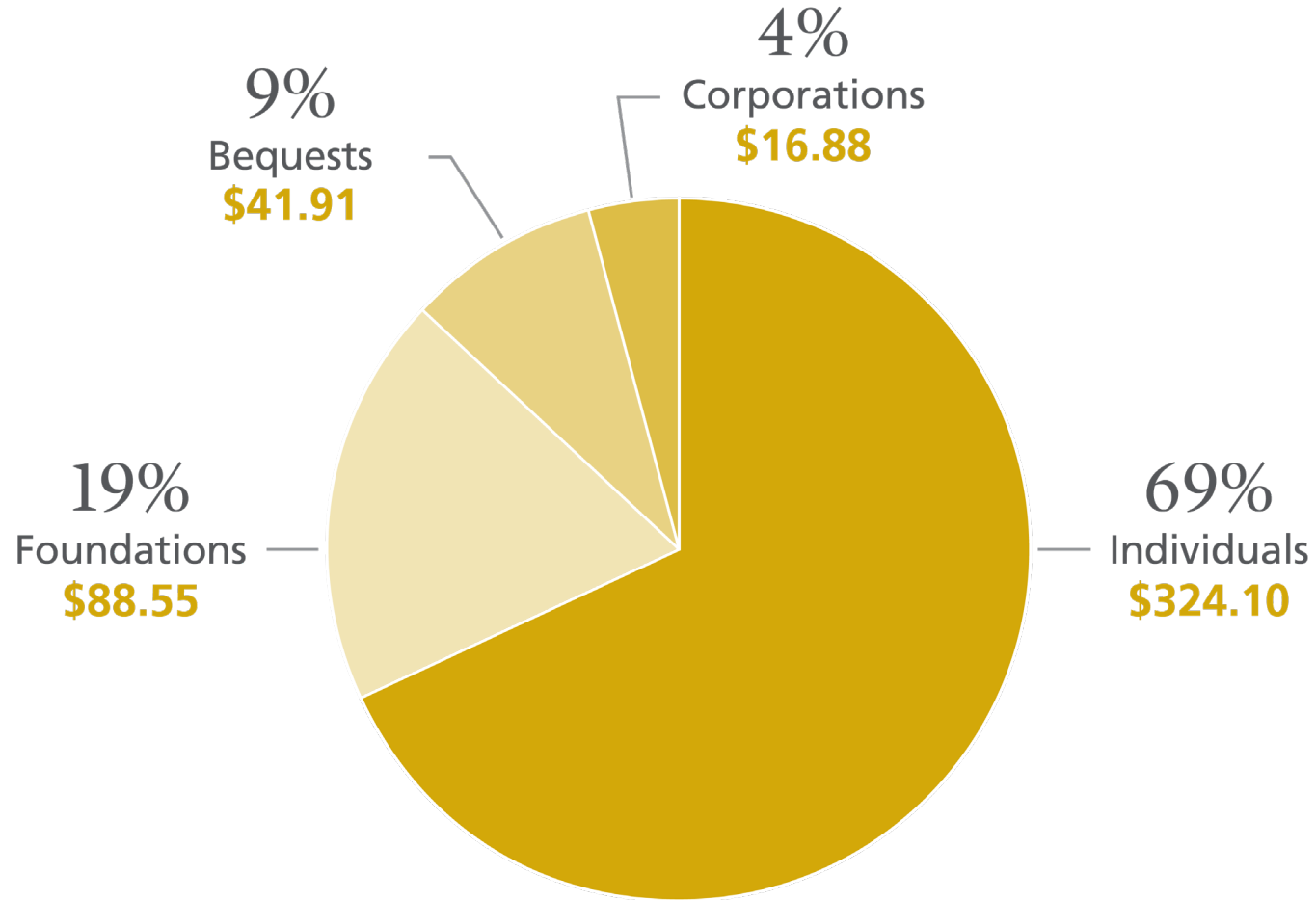
bit.ly/CandidRacialEquity





2020 contributions: \$471.44 billion by source of contributions

(in billions of dollars - all figures are rounded)



Good news!

The Fundraising Effectiveness Project’s 2021 quarter 1 report finds that charitable giving grew 10.6% in 2020 over 2019 – and most of that growth was more donors giving gifts less than \$1,000.

“We saw a tremendous level of giving in 2020 because of the pandemic, people giving to social issues and other factors,” said Mike Geiger, MBA, CPA, president and CEO of the Association of Fundraising Professionals. **“That strong level of giving continued into the first quarter of 2021, and then started to level off.”**

Key Insights

- Dollars, donors, and retention rates remain stable since Q2 2021.
- Q3 data helps confirm that trends in Q2 2021 were merely a correction, and not the beginning of a new downward trend.
- Small increase in dollars along with a small decrease in donors suggests greater impact of large donors going forward
- Drop in donors which donate 3-6 times and increase in donors which donate 7+ times. The most frequent donors are stepping up.



DONORS

-1.4%

(+/- 3.5%)

YOY change



DOLLARS

1.4%

(+/- 3%)

YOY change



RETENTION

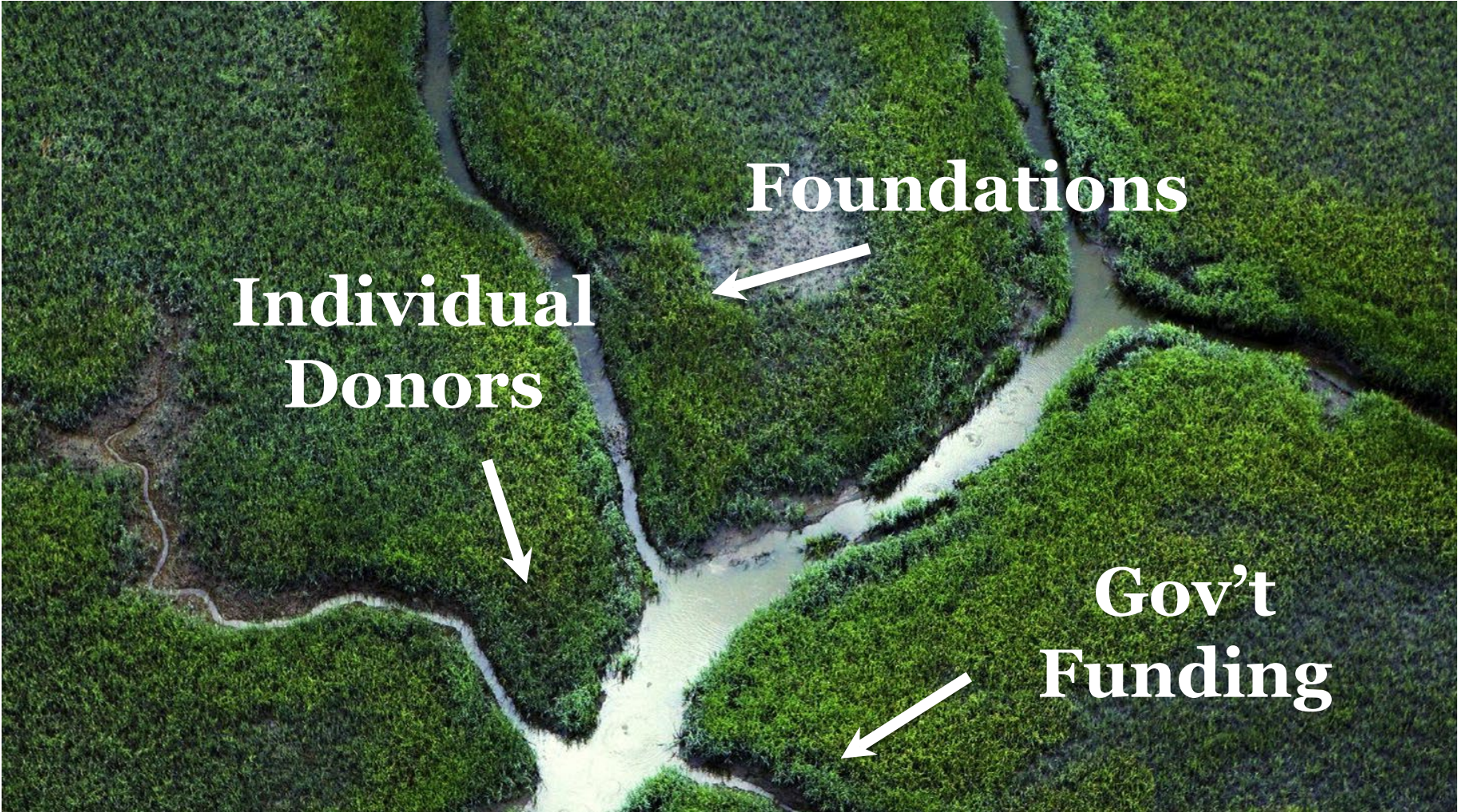
-7.2%

(+/- 0.5%)

YOY change

Source: [Fundraising Effectiveness Project](#)

Key: to create stability through diversifying funding streams

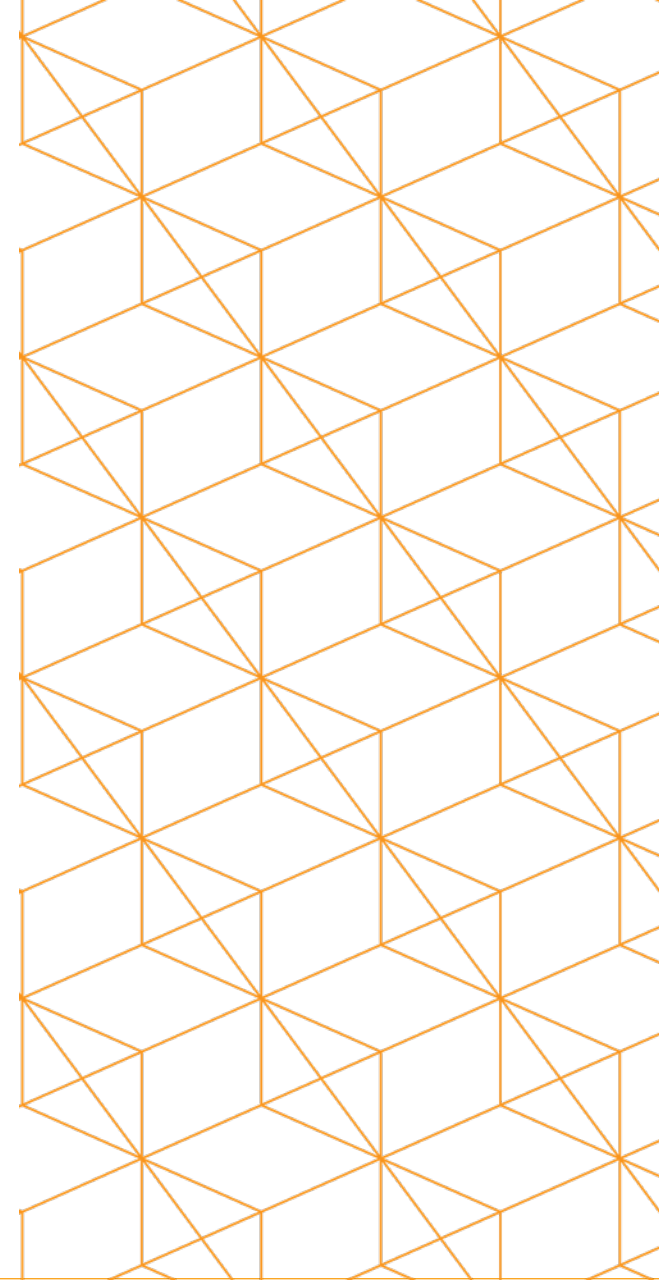


Group Discussion

- What does this data say about the larger giving landscape?
- How is this info relevant to you and your organization?



How to build the funder relationship and find grants



Do your homework first



To get the grant, you have to find the right match

- Who funds in my area of interest and the population I serve?
- Who funds in my geographic region?
- Who will provide the support I need?

Ask for the right amount



You don't need to know someone to get a grant, but it can help you get your foot in the door

Where to find a connection

- ✓ Your board members or donors
- ✓ Organizational partners
- ✓ Your current funders
- ✓ Check your LinkedIn network



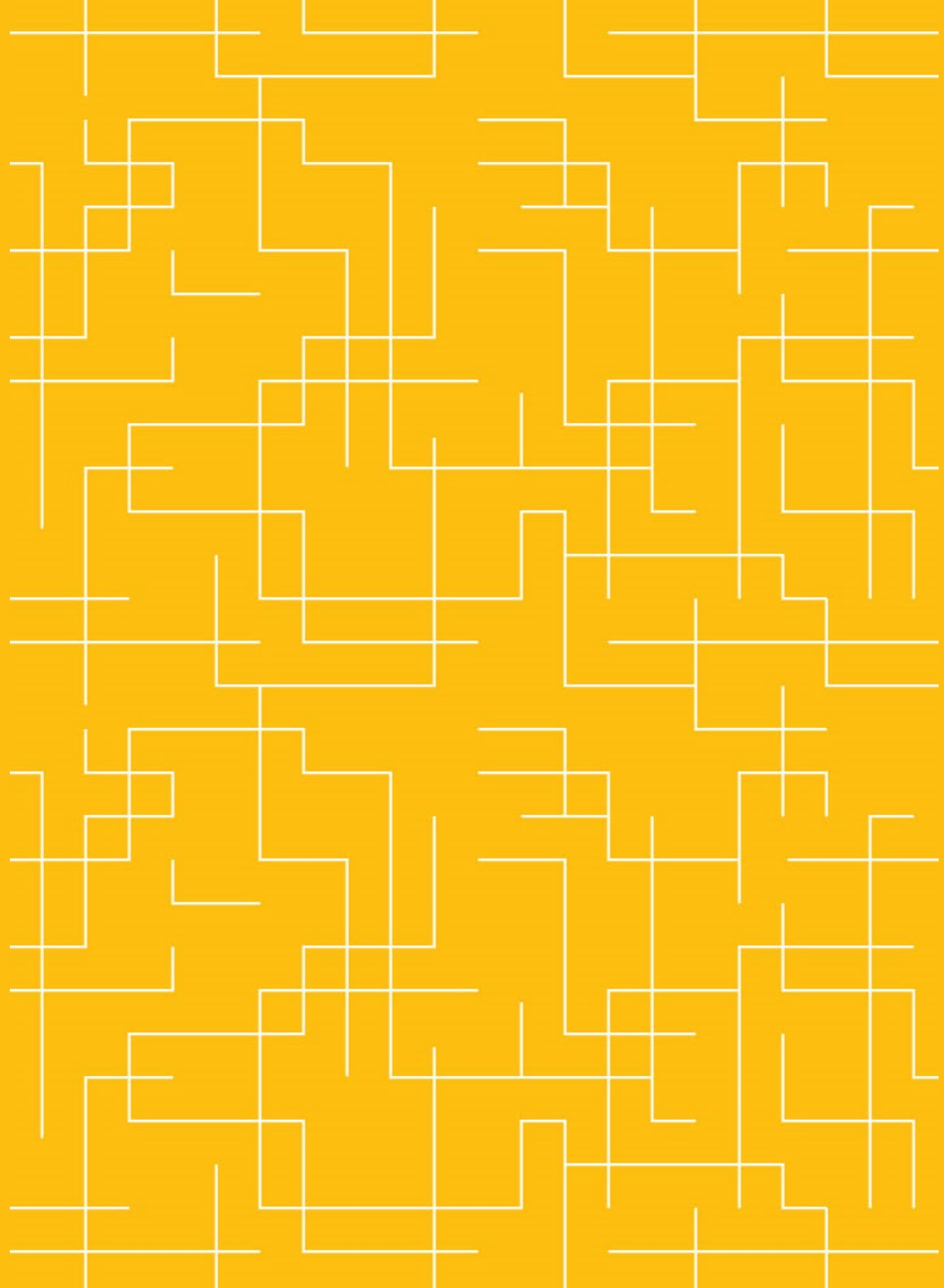
Grantseeking tips during a crisis

- Communicate – before, during and after the crisis
- Avoid generic/mass email solicitations
- Check-in /extend gratitude
- Share what you're learning, what you're doing to manage the crisis and serve the mission

Exercise:

What is your current story?

1. Think/Write
2. Share with Small Group
3. Group Share Out



Prospect research through 990s is time consuming

Save time and win funding with Foundation Directory.

- Build and refine prospect lists by knowing how much a funder supports your mission
- Find connections with key decision-makers
- Influence prospecting strategies with Recipient profiles

Get valuable insights you need to succeed.
Learn more: fdo.org/guide



Foundation Directory

Unsurpassed in:

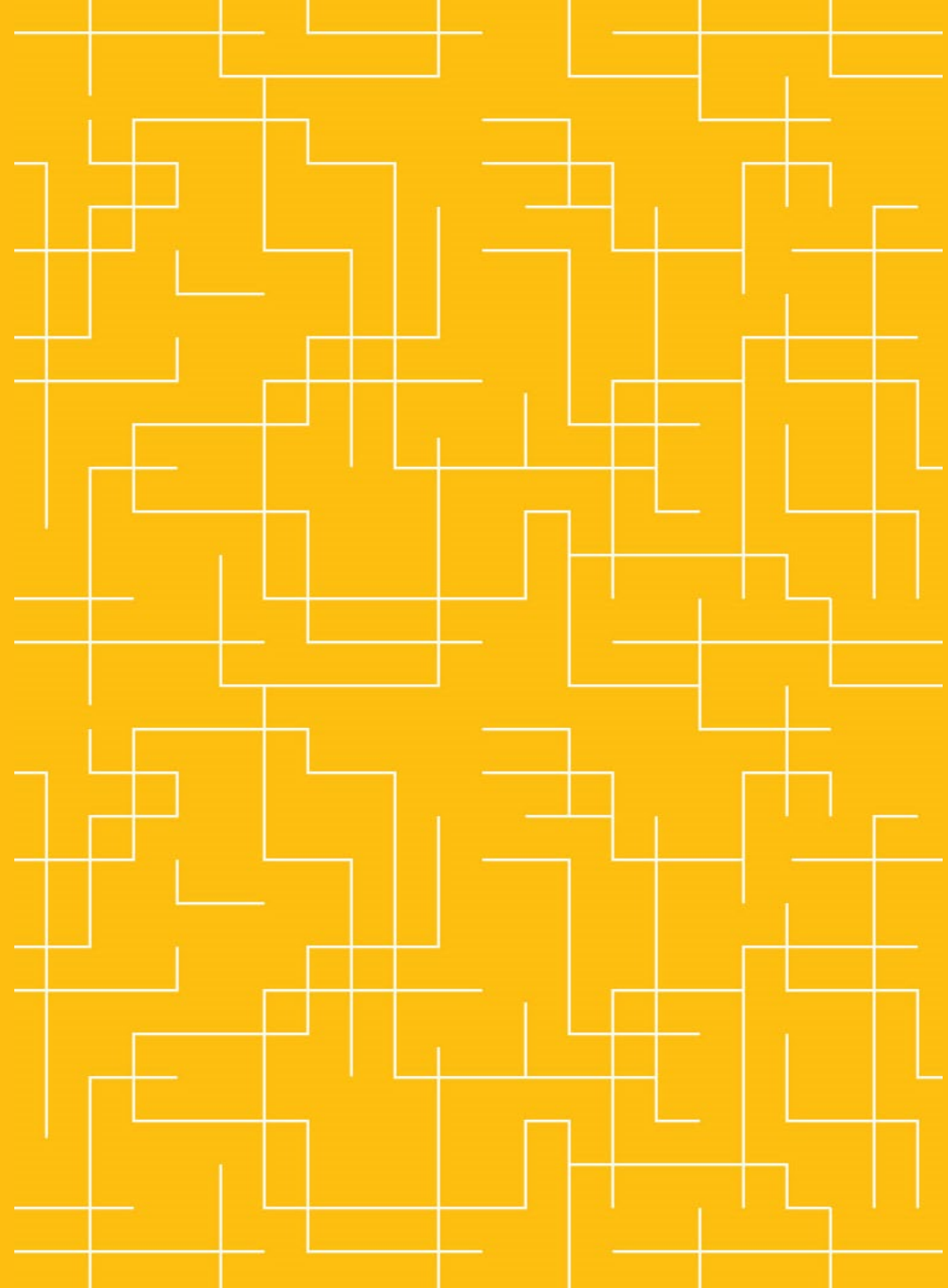
- Scope: 200K+ funders, 2M+ recipients, 4M+ grants added yearly
- Depth: Detailed profiles of funders, grants, recipients, companies
- Currency: Updated daily



Poll

*How familiar are you with
Foundation Directory?*

1. Very (expert status)
2. Somewhat (used it in the last year)
3. Not all (have never used it)
4. What's FDO?

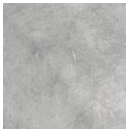


Where can you access *Foundation Directory*?

370+
Funding Information
Network partners

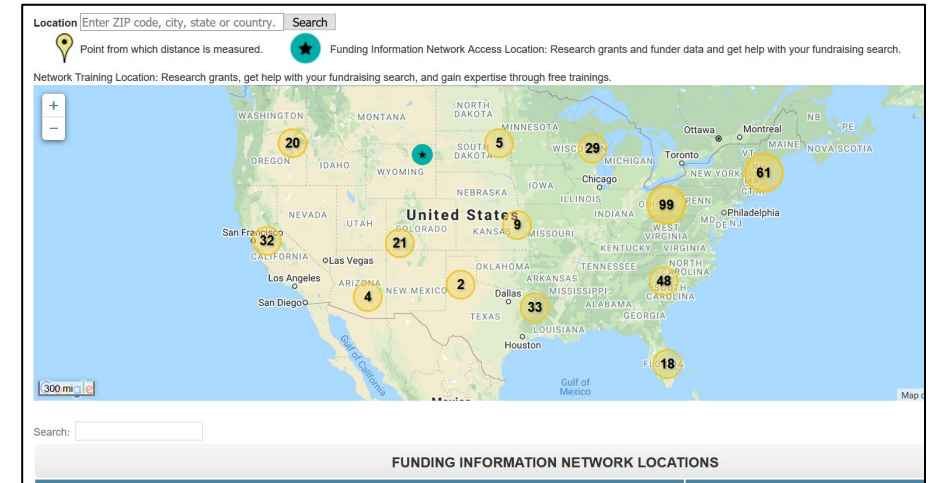


By subscription:
fdo.org



Where to freely access *Foundation Directory*

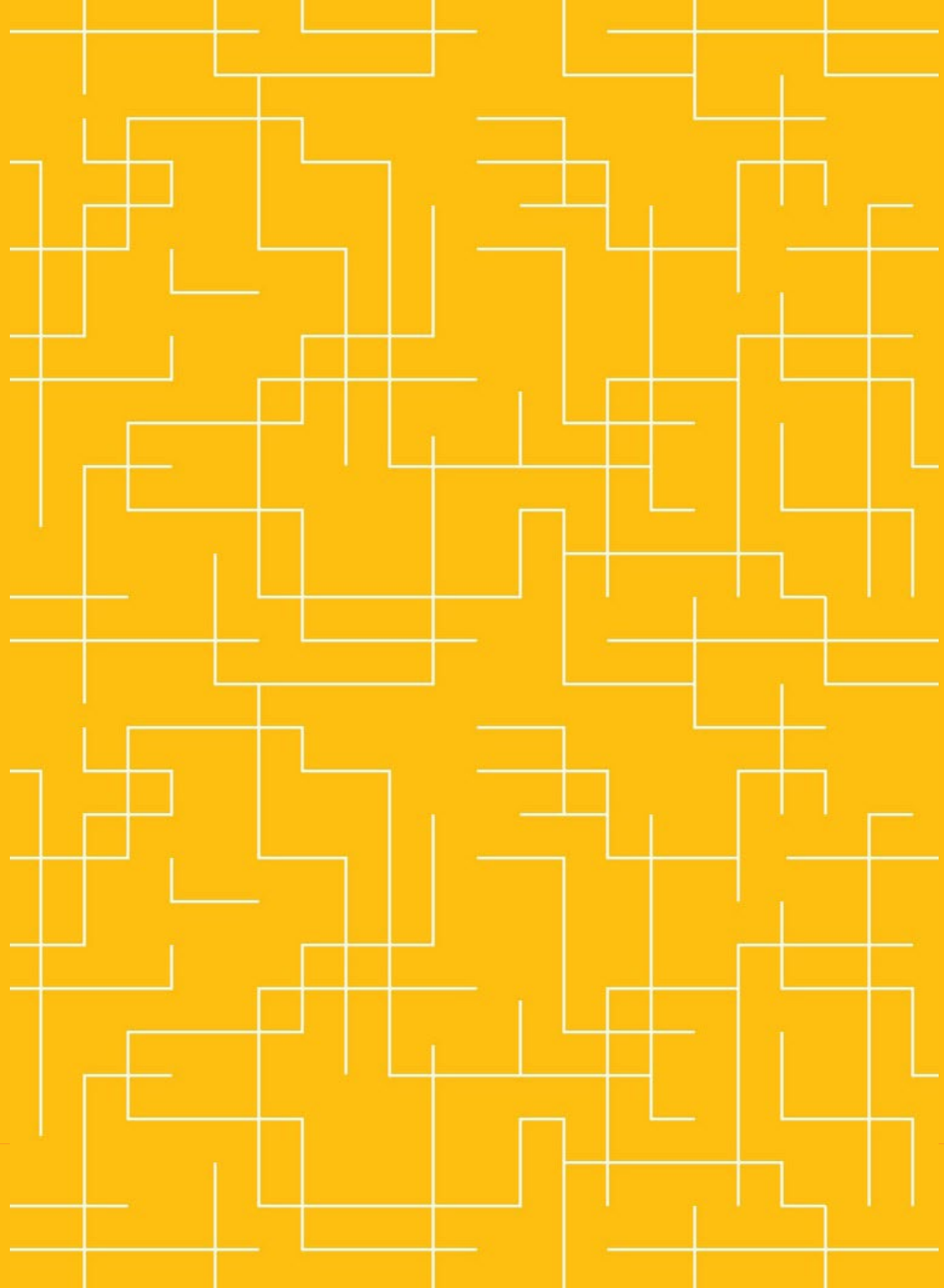
Visit/contact our Funding
Information Network Partners:
learning.candid.org/find-us/



Use your Candid Profile
to tell your story and
build trust

Pop quiz #1

How many active nonprofits
are there in California?

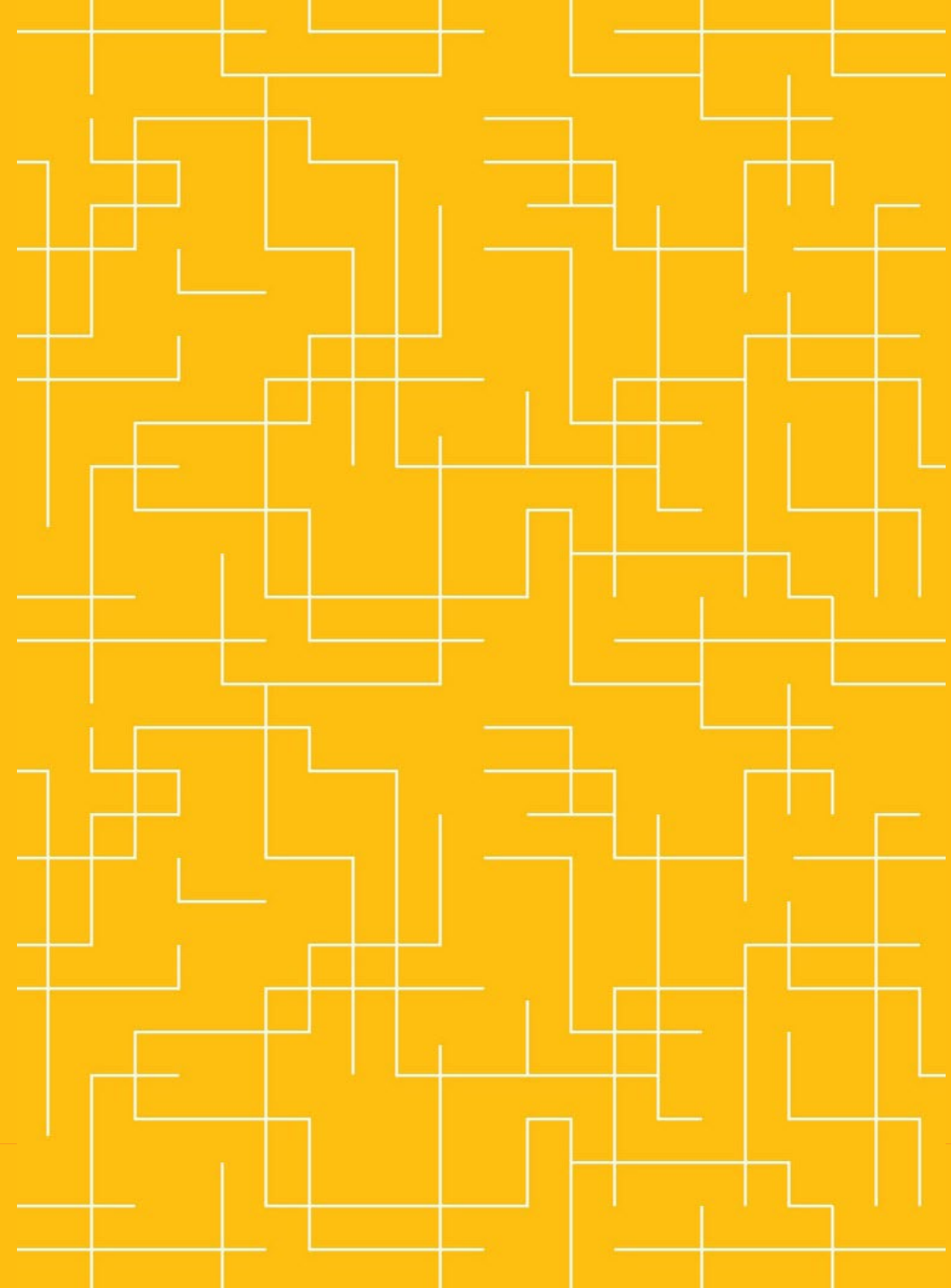


Pop quiz #1

How many active nonprofits
are there in California?

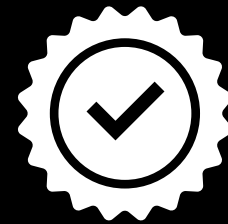


187,730

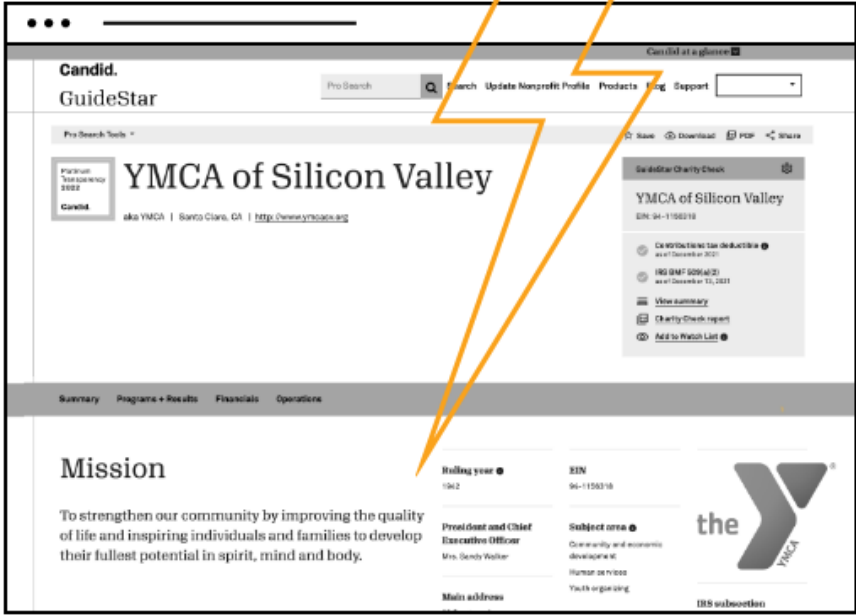


How can you grow trust?

A nonprofit's accomplishments is one of the top factors in establishing donor trust, along with name recognition and third-party evaluation.



What is a Candid Profile?



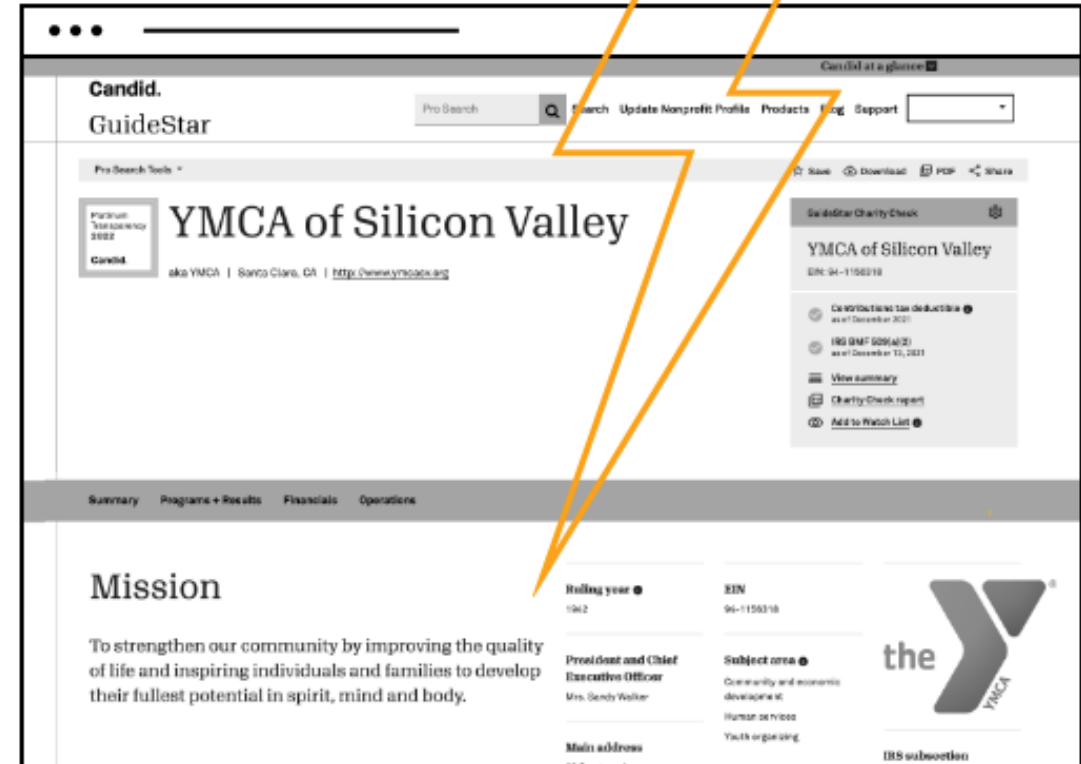
or



💡 Hint: It's a tool for sharing your organization's story and building trust.

Candid Profiles

- Go beyond IRS data
- Provide insights on millions of nonprofits
- Include information from nonprofits themselves, 990s, and other 3rd party sources



Financial Info

Business Model Indicators [View glossary & formula definitions](#)

Profitability	Explanation	2013	2014	2015	2016	2017
Unrestricted surplus (deficit) before depreciation		\$423,439	\$181,284	\$72,989	\$192,833	\$605,228
As % of expenses		90.1%	18.0%	5.0%	10.3%	25.2%
Unrestricted surplus (deficit) after depreciation		\$385,176	\$123,815	\$30,428	\$154,455	\$567,630
As % of expenses		75.8%	11.6%	2.0%	8.1%	23.3%

Revenue Composition	Explanation	2013	2014	2015	2016	2017
Total revenue (unrestricted & restricted)		\$650,162	\$1,178,038	\$1,540,621	\$2,140,202	\$3,409,174
Total revenue, % change over prior year		32.6%	81.2%	30.8%	38.9%	59.3%
Program services revenue		46.4%	52.4%	61.5%	61.1%	44.2%
Membership dues		0.0%	0.0%	0.0%	0.0%	0.0%
Investment income		0.0%	0.0%	0.0%	0.1%	0.1%
Government grants		0.0%	0.0%	2.8%	0.6%	0.0%
All other grants and contributions		51.8%	47.5%	35.7%	38.2%	55.8%
Other revenue		1.7%	0.1%	0.1%	0.1%	0.0%

Expense Composition	Explanation	2013	2014	2015	2016	2017
Total expenses before depreciation		\$470,081	\$1,006,614	\$1,457,879	\$1,877,757	\$2,403,068
Total expenses, % change over prior year		89.9%	114.1%	44.8%	28.8%	28.0%
Personnel		52.2%	57.3%	65.7%	64.4%	71.9%

FINANCIALS

Davis Memorial Goodwill Industries
Fiscal year: Jan 01 - Dec 31

FINANCIAL DOCUMENTS

[Download Audited Financials](#)

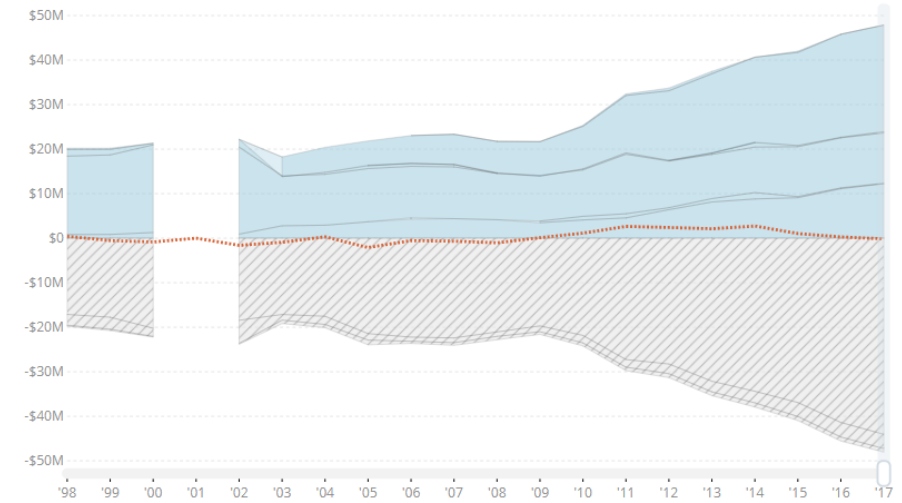
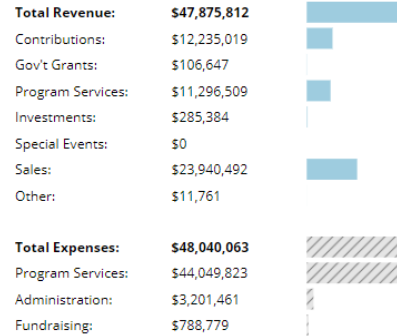
Yes, financials were audited by an independent accountant.

Revenue vs. Expenses

Source: IRS Form 990

2017 Breakdown

Net Gain/Loss: -\$164,251 in 2017



Note: When component data are not available, the graph displays the total Revenue and/or Expense values.

Liquidity in 2017

1.74

Average of 1.45 over 10 years



Source: IRS Form 990

Months of Cash in 2017

0.2

Average of 0.6 over 10 years



Source: IRS Form 990

Fringe Rate in 2017

22%

Average of 24% over 10 years



Source: IRS Form 990

Operational Info

Officers, Directors, Trustees, and Key Employees		
Source: IRS Form 990		
DOWNLOAD		
Show data for Fiscal Year	2017	
<input type="checkbox"/> Compensation		
<input type="checkbox"/> Other		
<input type="checkbox"/> Related		
	\$402,382	CATHERINE A MELOY PRESIDENT & CEO
	\$124,534	
	\$0	
	\$228,021	ROSA PROCTOR CHIEF FINANCIAL OFFICER
	\$38,257	
	\$0	
	\$175,549	MICHAEL FROHM CHIEF OPERATING OFFICER
	\$29,209	
	\$43,887	
		ADRIAN CHAPMAN CHAIR
		GLEN S HOWARD VICE CHAIR & DIRECTOR
		ELIZABETH KARMIN SECRETARY
		KENNETH SAMET TREASURER
		DR THOMAS CHAPMAN DIRECTOR
		JAMES DINEGAR DIRECTOR

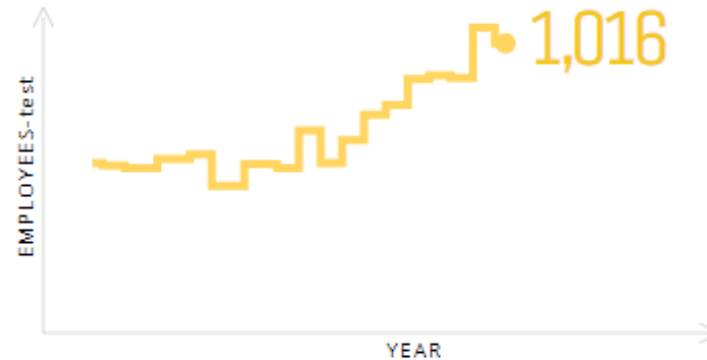
President & CEO

Mrs. Catherine Meloy

Catherine Meloy serves as President and CEO of Goodwill of Greater Washington and the Goodwill Excel Center Adult Charter High School. Prior to joining Goodwill in 2003, Catherine had a ... [READ MORE](#)

Number of Employees Over Time

SOURCE: IRS Form 990



Candid data partner network

Social Media & Tech



Giving Platforms



Financial Institutions



Grants Management



Media & Researchers



Other



The Candid Seals of Transparency



Share your mission and keep basic contact information up-to-date
so donors can find you



Provide program(s) information and brand details
to guide funding decisions



Provide financial and leadership information
to gain trust and support



Share your measures of progress + results
to highlight your impact

Benefits to earning a Seal

- Makes the case for funding your work
- Creates or enhances online identity (for free)
- Increases your visibility on guidestar.org and our 220+ partners
- Saves time — all your most critical and current information in one place
- Demonstrates your commitment to transparency (share your Seal)
- Share progress and results so you can help combat the Overhead Myth

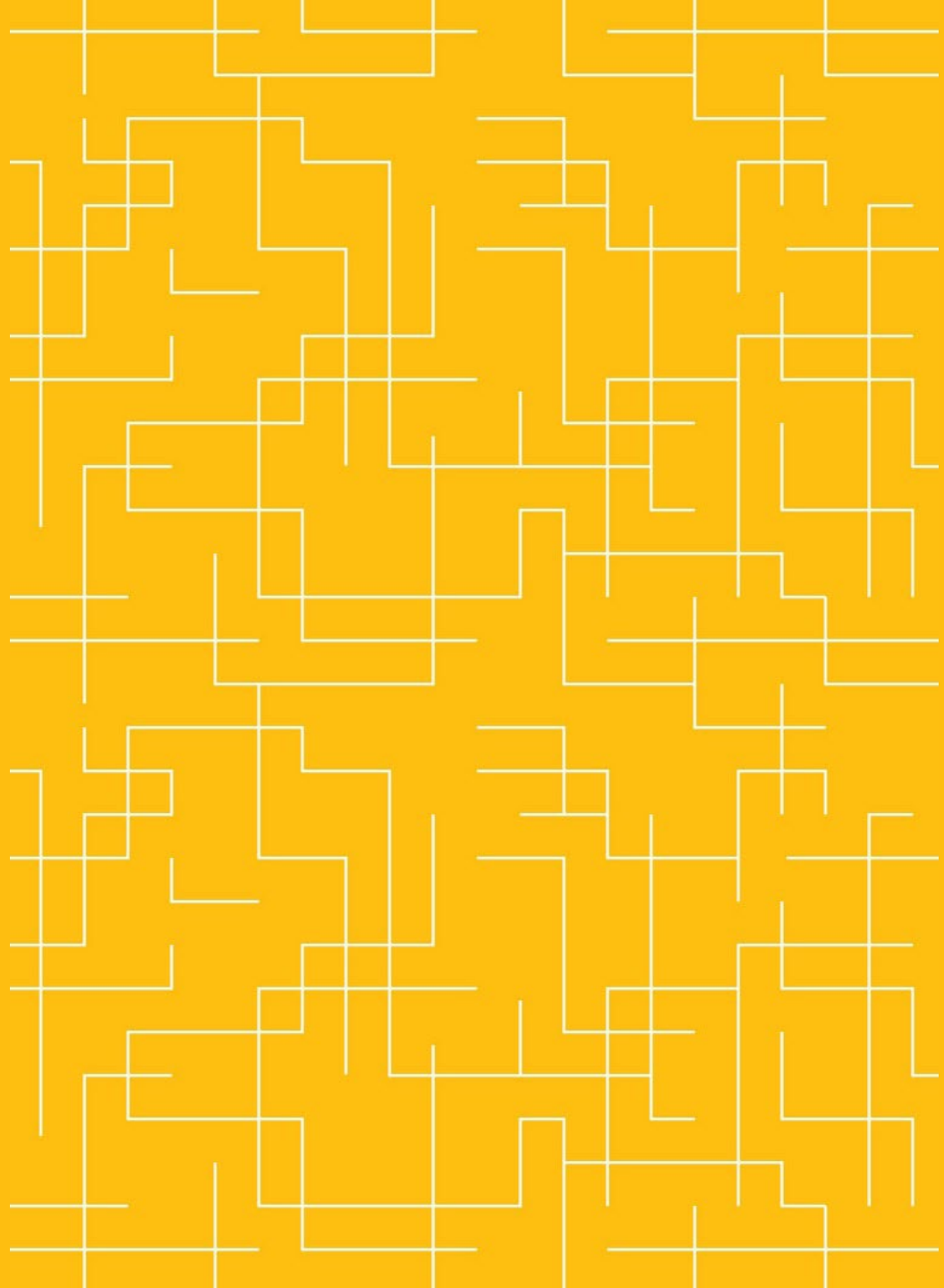


Pop quiz #2

How many nonprofits in California have earned a Platinum Seal of Transparency?



+



Pop quiz #2

How many nonprofits in California have earned a Platinum Seal of Transparency?



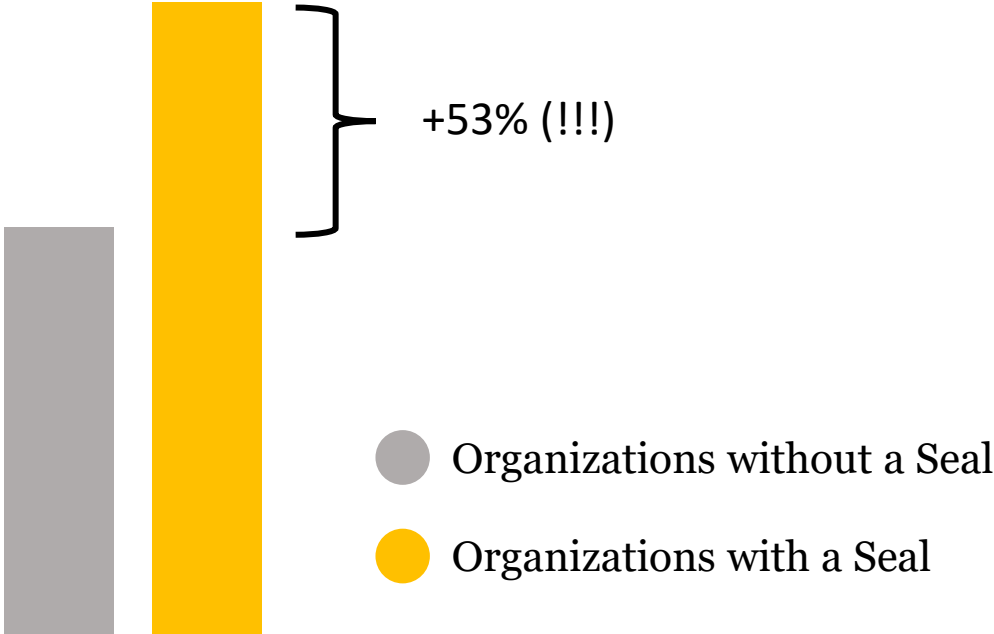
+



1,953

It turns out that transparency pays off

Year over year contributions to nonprofits



Source: Villanova University research published in accounting journal, linking earning a GuideStar Seal of Transparency to more contributions. Learn more at learn.guidestar.org/transparency

Get your 2022 Seals in three easy steps

1

Access your profile

2

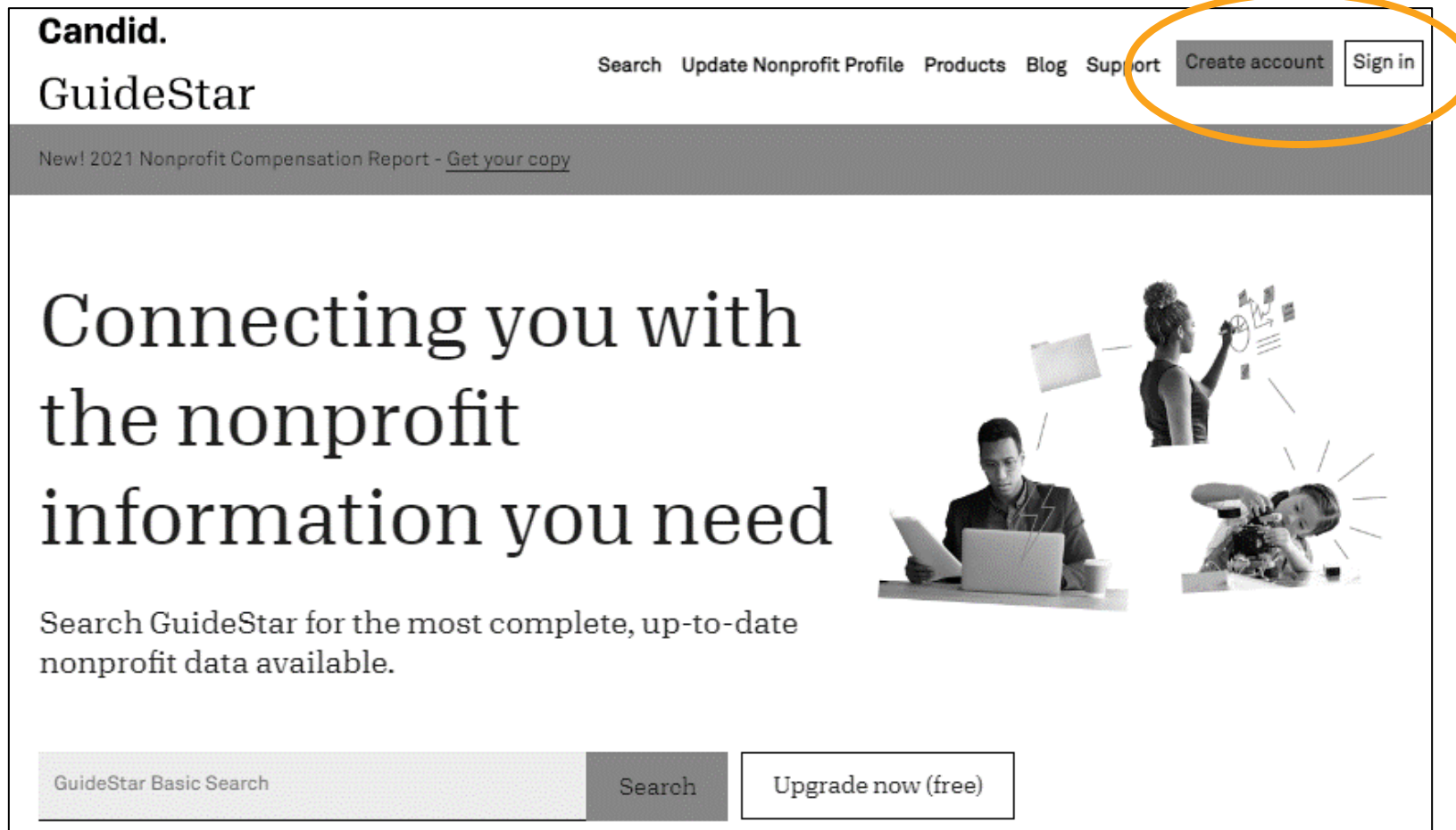
Update required info

3

Publish



Accessing your profile: First, sign in or create an account



Candid.
GuideStar

Search Update Nonprofit Profile Products Blog Support **Create account** Sign in

New! 2021 Nonprofit Compensation Report - [Get your copy](#)

Connecting you with the nonprofit information you need

Search GuideStar for the most complete, up-to-date nonprofit data available.

GuideStar Basic Search Search Upgrade now (free)

The screenshot shows the top navigation bar of the Candid GuideStar website. The 'Create account' and 'Sign in' buttons are highlighted with an orange circle. Below the navigation bar is a banner with the text 'Connecting you with the nonprofit information you need' and an image of three people working. At the bottom of the banner is a search bar with a 'Search' button and an 'Upgrade now (free)' button.

To claim your nonprofit's Candid profile, connect your account to your organization

Search for your organization

Validate your connection

Now, let's match you with your organization on GuideStar

Searching by your Employer Identification Number (EIN) is the surest way to find your organization.

Organization name or EIN Select HQ location

Validate your connection

Provide info to validate your connection to this organization and request to update its profile.

About your organization

Name
Candid

EIN
13-1837418

Doing business as

Website *
 We do not have a website.
(You'll have to provide more information)

* We do not accept Facebook pages or non-working websites

Phone

About you

First name *

Last name *

Once your connection is approved, log in to update your nonprofit's Candid profile

The screenshot shows the Candid GuideStar user interface. At the top left, the logo reads "Candid. GuideStar". To the right is a search bar with "Pro Search" and a magnifying glass icon, followed by the text "Search". A link labeled "Update Nonprofit Profile" is circled in orange. Further right are links for "Products", "Blog", and "Support", and a dropdown menu. Below the navigation bar, the main heading reads "Your organizations on GuideStar". Underneath, it says "2 organizations". The first organization listed is "Candid" with EIN: 13-1837418. A row of action buttons is shown below the organization name: "Edit" (circled in orange), "Assign managers", "Benefits", and "Donation Reporting".

Get your 2022 Seals in three easy steps

1

Access your profile

2

Update required info

3

Publish



Earn Bronze in 5 minutes or less



Share your mission and keep basic contact information up-to-date **so donors can find you**

- Contact information
- Donation information
- Mission and categorization
- **New!** Grantmaker status - Does your organization make grants or donations? (Yes or No)
- Leader name

💡 **Tip:** Use [the 2022 Seals of Transparency Guide](#) to identify fields that you need to complete.

Get your 2022 Seals in three easy steps

- 1 Access your profile
- 2 Update required info
- 3 Publish



The Candid Seals of Transparency



Share your mission and keep basic contact information up-to-date
so donors can find you



Provide program(s) information and brand details
to guide funding decisions



Provide financial and leadership information
to gain trust and support



Share your measures of progress + results
to highlight your impact

Optional: Share staff demographics and equity strategies

- Share demographic information about your staff as a whole
- Complete the Equity Strategies Checklist
- Learn more at bit.ly/nonprofitprofileDEI

Resources to help along the way

- Use the [2022 Seals of Transparency Guide](#) to identify information you need to gather.
- Bookmark and reference help.guidestar.org to get answers to your questions, including connecting with our support team

Questions?

Thank you.

How did we do?

Your feedback is important to us! Please take a moment to fill out our course survey:

<https://bit.ly/fundcrisis2022>

Stay Connected

Never miss a virtual training by
subscribing to our Candid Learning
newsletter

bit.ly/CandidLearningNewsletter

Find us on Facebook and Twitter at
[@Candid_Learning](https://www.facebook.com/Candid_Learning)

