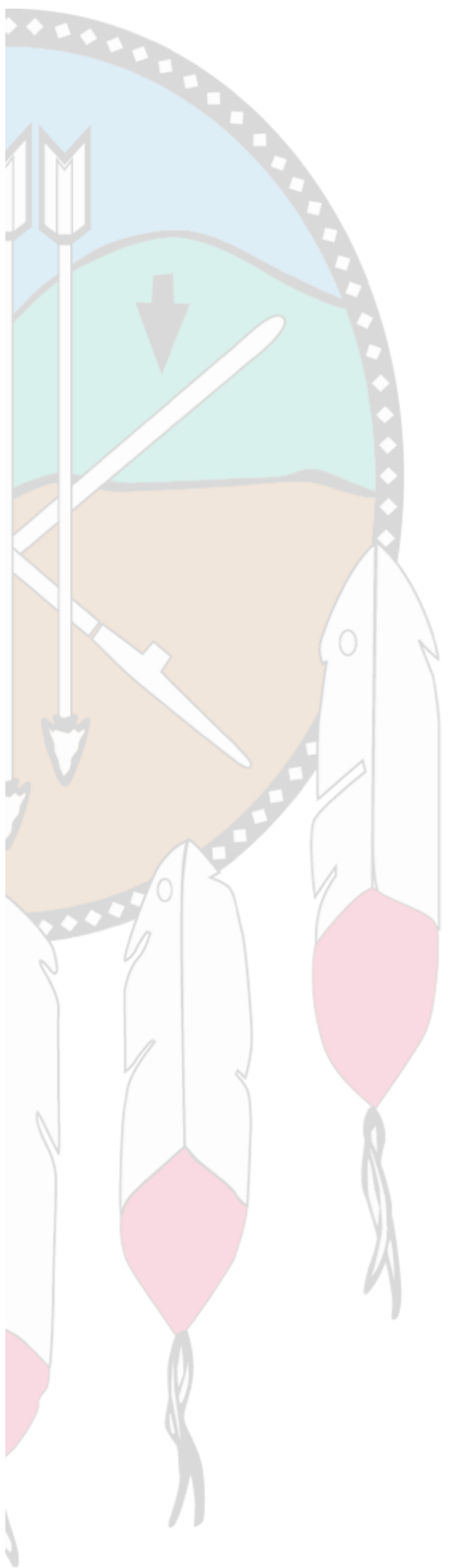


Agenda

- Welcome
- Guest Speaker Introductions
 - Krista Berry Ortega, Program Manager, West – *Candid*.
 - Laura Bergman, Programs Assistant, West – *Candid*.
- Fundraising During Times of Crisis – Krista Berry Ortega & Laura Bergman
- Reflection – Krista Berry Ortega & Laura Bergman
- Q&A Period
- Announcements

Webinar “Housekeeping” Information

- If you have questions, post them in the chat box
- Webinar will be recorded
- Presentation will be emailed after the webinar
- Survey will be emailed after the webinar
- Please remain muted during the presentation
- Turn off your camera if you’re not speaking



Guest Speaker Introductions

Today's Facilitators



Krista Berry Ortega

Programs Manager - West, Candid

Pronouns: she/her



Laura Bergman

Programs Assistant - West, Candid

Pronouns: she/her

What is Candid?

On February 1, 2019, Foundation Center and GuideStar joined forces to become Candid, a 501c3 nonprofit organization. Together, these organizations brought a combined 88 years of expertise and millions of data points to Candid.

Why Candid?

Every year, millions of nonprofits spend trillions of dollars around the world. Candid finds out where the money comes from, where it goes, and why it matters.

How?

Through research, collaboration, and training, Candid connects people who want to change the world to the resources they need to do it.

Connect with us

Sign up for our online newsletter
bit.ly/CandidLearningNewsletter

Find us on Facebook and Twitter at
[@Candid_Learning](#)



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 Nonprofit Profile on GuideStar informs potential donors and funders and powers 200+ charitable sites

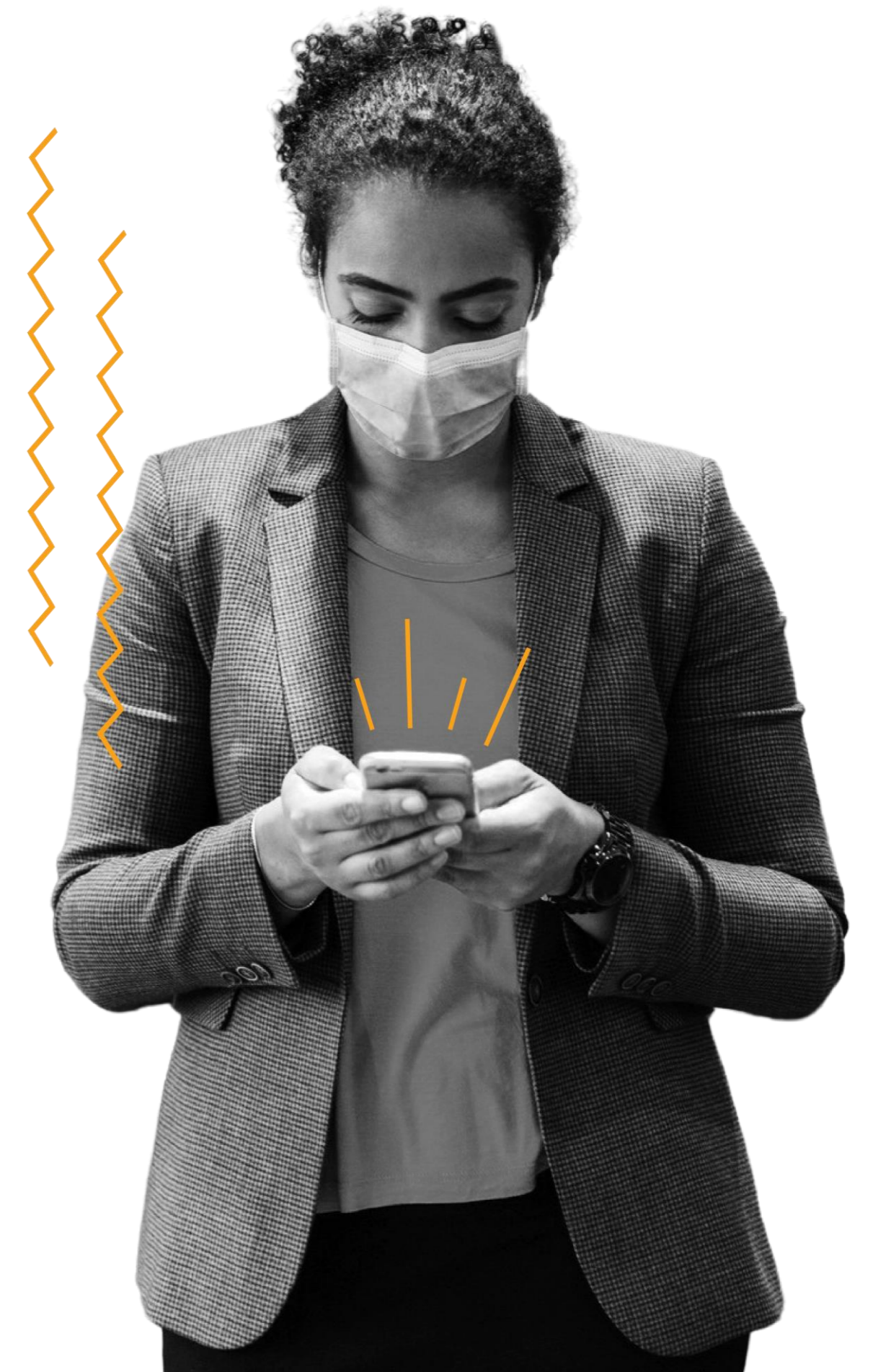


Our response to global events

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 here:
bit.ly/CandidResourcesCOVID19

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



Our COVID-19 response

Thank you for being a part of Candid's learning community. With the evolving coronavirus (COVID-19) crisis, we know it's a challenging time for everyone.

To prioritize the safety and health of our communities during this time, we've shifted many of our in-person programs to an online format, so you're able to continue your professional development.

Learn more about changes in our programming, how you can stay connected with us, and our free resources here: bit.ly/CandidResourcesCOVID19



COVID-19: The State of Foundation Funding

- As of August, **\$13.9 billion** has been committed by funders for Coronavirus relief: <https://candid.org/explore-issues/coronavirus>
- About two thirds of this support comes from **corporate funders**, particularly financial services and tech companies
- **Community foundations** are also especially active now: \$1 billion so far
- There is a push for an Emergency Charity Stimulus bill: <http://charitystimulus.org/>

COVID-19: The State of Foundation Funding

- **Half of small grantmakers are giving more**, including beyond their existing grantees, and **two thirds have made their grant guidelines more flexible** (source: Exponent Philanthropy)
- 5 of the largest funders have committed to **increasing their payout rates**: Ford Foundation, Kellogg Foundation, MacArthur Foundation, Doris Duke Charitable Foundation, and Andrew W. Mellon Foundation

Racial Equity Resources

Funding for Racial Equity:

As of August, **\$10.0 billion** has been committed by funders:

<https://candid.org/explore-issues/racial-equity>

Statistics on which foundations are investing in racial equity and where that funding is going, news related to advancing equity in the social sector, and free research produced by organizations around the world. **Currently over 6,000 foundations have committed funding toward racial equity.**

Webinars on Diversity, Equity &

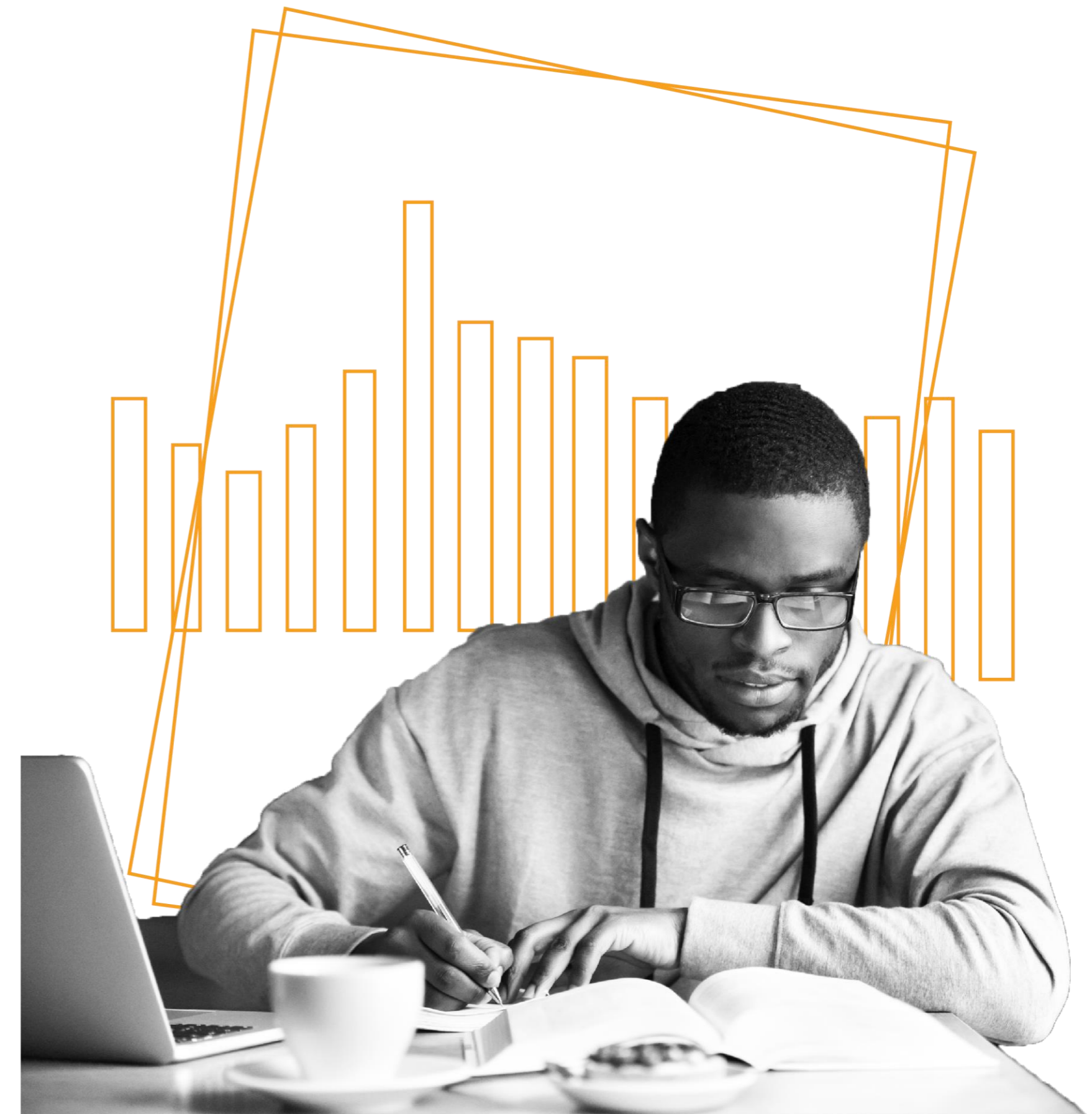
Inclusion

Candid has hosted a range of webinars related to DEI (Diversity, Equity, and Inclusion). You can access a playlist of these webinars' videos on YouTube.



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

Grants Research Resources

candid.org/coronavirus

RFPs

Coronavirus Relief Funds

candid.org/explore-issues/racial-equity

grantsplus.com/racial-justice-grants/

Foundation Directory Online

fconline.foundationcenter.org/

Foundation Directory Online (FDO)

FDO is a searchable, web-based tool that lets you find funders faster so you can spend more time on building relationships with them.

Unsurpassed in:

- **Scope:** 165K+ funders, 1M+ recipients, 4M+ grants added yearly
- **Depth:** Detailed profiles of funders, grants, recipients, companies
- **Currency:** Updated daily

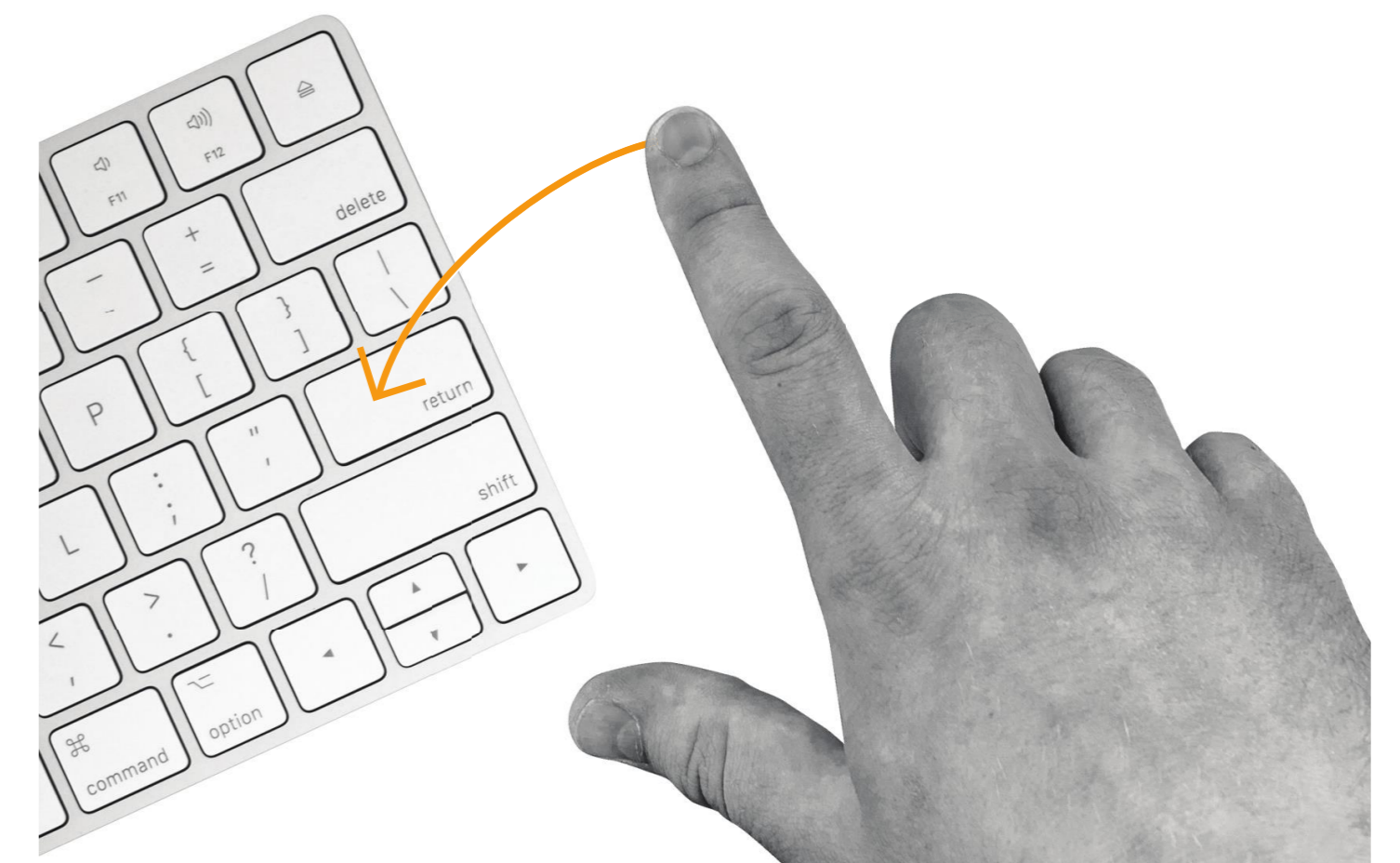


Where can you access FDO?

400+
Funding Information
Network partners



By subscription:
fdo.org



Where can you get help with FDO?

Self-serve resources

- FDO Quick Guide
- Help articles
- YouTube videos

Person-to-person assistance

- Library Staff
- Chat or email with Candid staff

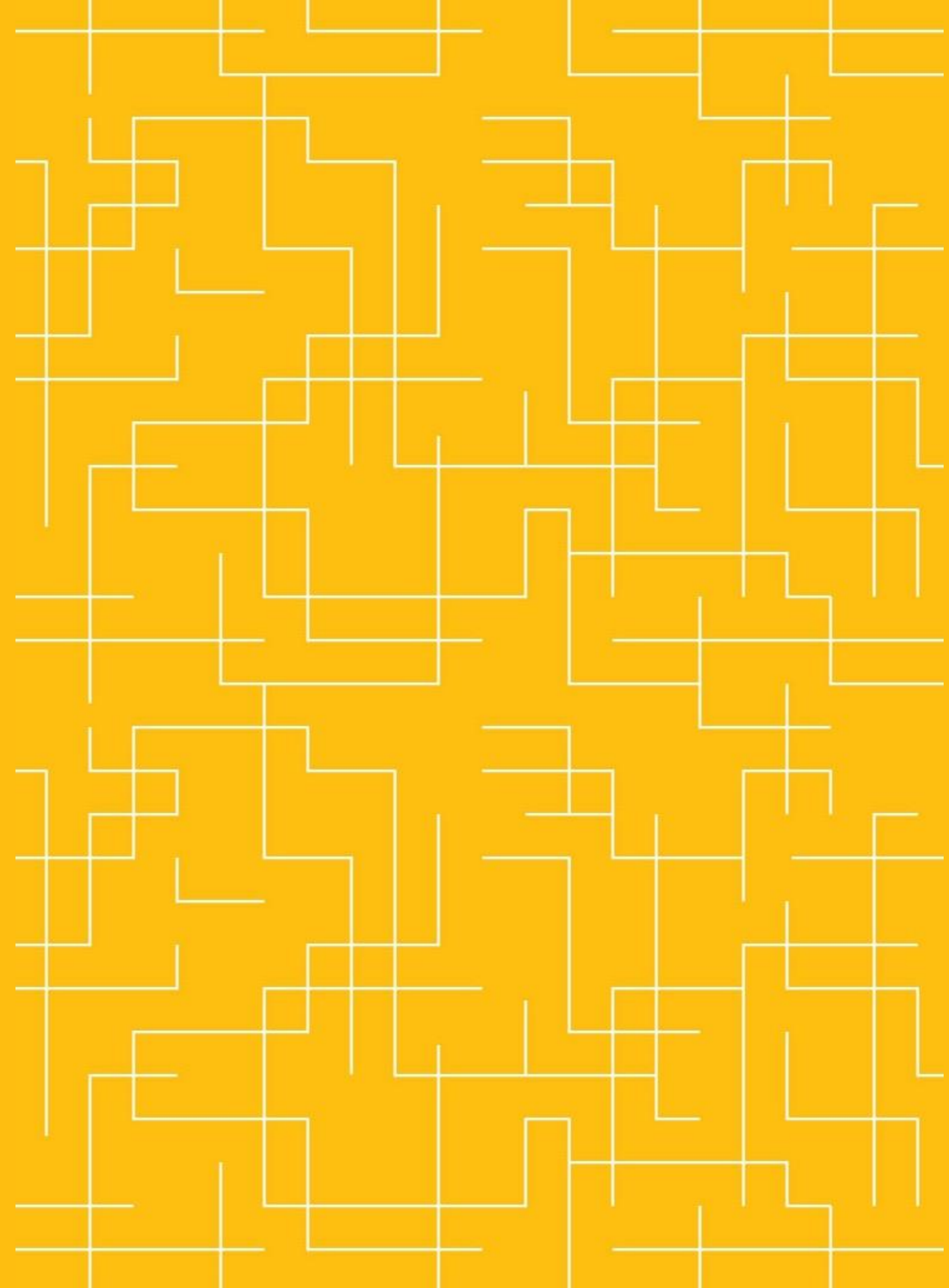


Tell your story with Guidestar.org



Pop quiz

How many active nonprofits are there in California?

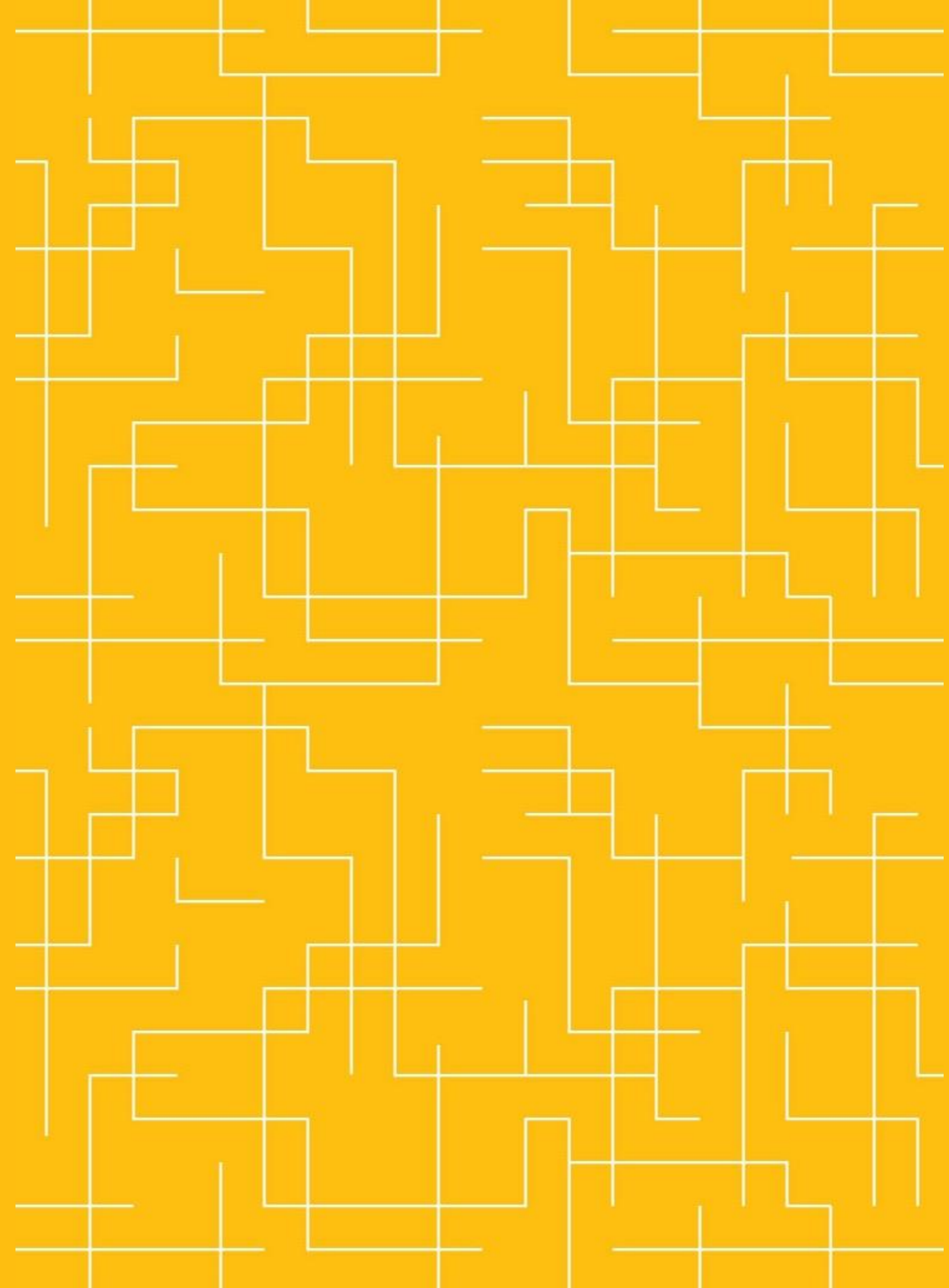


Pop quiz

How many active nonprofits are there in California?



188,886



How can you grow trust?

A nonprofit's accomplishments are the number one factor in establishing donor trust, followed by their reputation and finances.



Source: Give.org

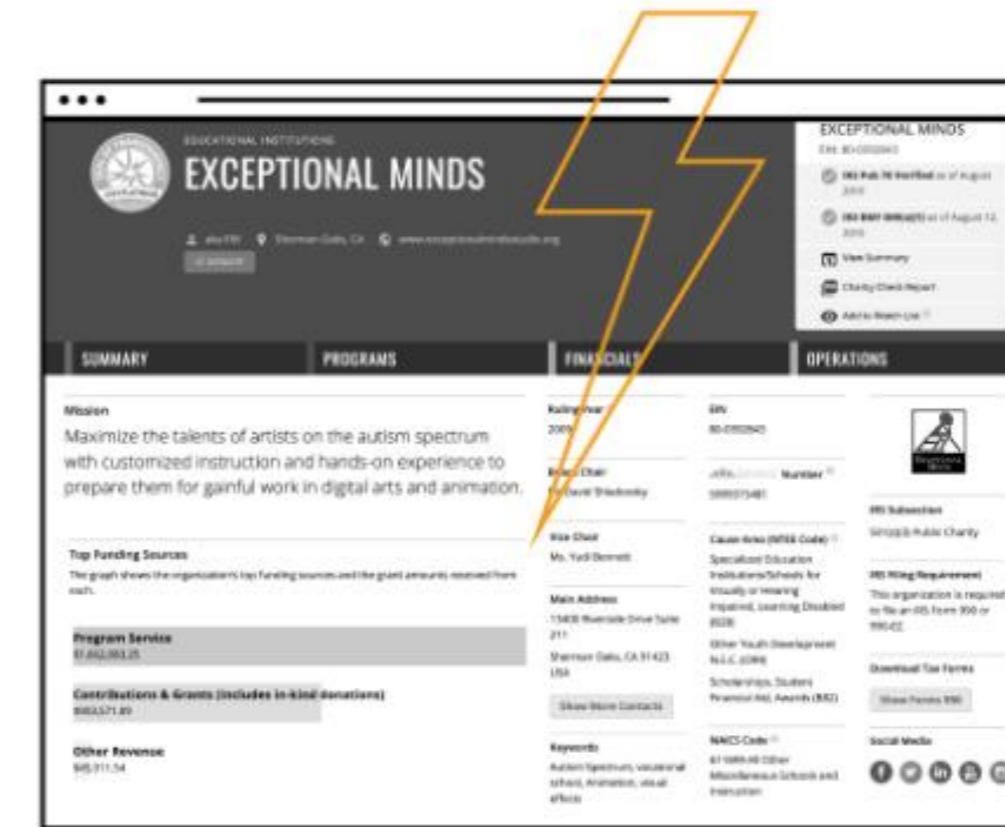
What's a Nonprofit Profile?



Step 1
Claim your profile
Request access to your organization's profile



Step 2
Get approved
We verify you are part of your organization and approve your access



Step 3
Update away
Begin telling your story right away

Nonprofit Profiles on GuideStar

- Goes beyond IRS data
- Insights on millions of nonprofits
- Meaningful data to move beyond information from nonprofits themselves, 990s, and other 3rd party sources

The screenshot shows the GuideStar profile for Goodwill Industries International, Inc. The page is titled "HUMAN SERVICES" and "GOODWILL INDUSTRIES INTERNATIONAL, INC. (HQ)". It includes a "GUIDESTAR CHARITY CHECK" section with a "Seal of Transparency 2019 Platinum" badge. The profile is divided into four main sections: SUMMARY, PROGRAMS, FINANCIALS, and OPERATIONS. The SUMMARY section includes a mission statement, top funding sources (Contributions: \$26,203,294; Federal award: \$25,241,764; Membership dues: \$20,716,618), and a "Show More Contacts" button. The FINANCIALS section includes Ruling Year (1952), President and CEO (Steve C. Preston), Main Address (15810 Indianola Dr, Rockville, MD 20855 USA), and a "Show More Contacts" button. The OPERATIONS section includes EIN (53-0196517), BRIDGE Number (3884607738), Cause Area (Human Service Organizations (P20)), NAICS Code (624190 Other Individual and Family Services), and SIC Code (8322 INDIVIDUAL AND FAMILY SERVICES). The page also features social media links and a "Download Tax Forms" button.

Your profile is what you make of it.



ANIMAL -- RELATED
NONPROFIT USA
CLOUDCROFT, NM

EIN: 38-4024118
✓ IRS Pub 78 Verified as of August 2019
✓ IRS BMF 509(a)(1) as of August 12, 2019
View Summary
Charity Check Report
Add to Watch List

SUMMARY | PROGRAMS | FINANCIALS | OPERATIONS

Mission
This organization has not provided GuideStar with a mission statement.

Ruling Year 2017
EIN 38-4024118
IRS Subsection 501(c)(3) Public Charity
Principal Officer Donna Rand
IRS Filing Requirement This organization is required to file an IRS Form 990-N.
Main Address PO BOX 904, CLOUDCROFT, NM 88317
Cause Area (NTEE Code) Animal Protection and Welfare (includes Humane Societies and SPCAs) (D20)
NAICS Code 813312 Environment, Conservation and Wildlife Organizations
SIC Code 8399 SOCIAL SERVICES, NEC; 8699 MEMBERSHIP ORGANIZATIONS, NEC

or

EDUCATIONAL INSTITUTIONS
EXCEPTIONAL MINDS
aka EM | Sherman Oaks, CA | www.exceptionalmindsstudio.org
DONATE

EXCEPTIONAL MINDS
EIN: 80-0392843
✓ IRS Pub 78 Verified as of August 2019
✓ IRS BMF 509(a)(1) as of August 12, 2019
View Summary
Charity Check Report
Add to Watch List

SUMMARY | PROGRAMS | FINANCIALS | OPERATIONS

Mission
Maximize the talents of artists on the autism spectrum with customized instruction and hands-on experience to prepare them for gainful work in digital arts and animation.

Ruling Year 2009
EIN 80-0392843
Board Chair David Shladovsky
IRS Filing Requirement This organization is required to file an IRS Form 990 or 990-EZ.
Vice Chair Ms. Yudi Bennett
Cause Area (NTEE Code) Specialized Education Institutions/Schools for Visually or Hearing Impaired, Learning Disabled (B28)
Main Address 13400 Riverside Drive Suite 211, Sherman Oaks, CA 91423, USA
Program Service \$1,662,083.25
Contributions & Grants (Includes in-kind donations) \$903,571.09
Other Revenue \$45,911.54
Keywords Autism Spectrum, vocational school, Animation, visual effects
NAICS Code 611699 All Other Miscellaneous Schools and Instruction
Download Tax Forms Show Forms 990
Social Media

IRS Forms 990

Pros

- Comprehensive
- Standardized
- Basic information

Cons

- Old data
- Too general
- No good program info

(ORIGINAL) 12/31/2003 *(ORIGINAL)* EIN 13-356610

(ORIGINAL) **990** Return of Organization Exempt From Income Tax
 Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)
 The organization may have to use a copy of this return to satisfy state reporting requirements.

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047
2003-3/2003
Open to Public Inspection

A For the 2003 calendar year, or tax year beginning 12/31, 2003 and ending 12/31, 2003

B Check if applicable:
 Address change
 Name change
 Initial return
 Final return
 Renewed return
 Application pending

C Name of organization: **HANDICAP INTERESTS INTL (WORLD RELIGIOUS COUNCIL)**
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite: **P.O. Box 1173 (P.O. Box 1173)**
 City or town, state or country, and ZIP+4: **SARANAC LAKE, NEW YORK 12983**

D Employer identification number: **13-356610**
 E Telephone number: **(518) 891-5466**
 F Accounting method: Cash Accrual
 Other (specify):

G Web site: **WWW.AHCHC.ORG**
 Organization type (check only one): 501(c)(3) (insert no.) 4947(a)(1) or 527

H and I are not applicable to section 527 organizations
 H(a) Is this a group return for affiliates? Yes No
 H(b) If "Yes," enter number of affiliates:
 H(c) Are all affiliates included? Yes No
 H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No
 I Enter 4-digit GEN: **---**

K Check here if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS; but if the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return.
 Gross receipts: Add lines 8b, 8c, 9b, and 10b to line 12: **1,000,000.00**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 16.)

1	Contributions, gifts, grants, and similar amounts received:		
a	Direct public support:		
b	Indirect public support:		
c	Government contributions (grants):		
d	Total (add lines 1a through 1c) (cash \$ 2,080,500.00 ; non-cash \$ 6,000,000.00):	1a	2,080,500.00
2	Program service revenue including government fees and contracts (from Part VII, line 83):	1b	24,000,000.00
3	Membership dues and assessments:	1c	13,500.00
4	Interest on savings and temporary cash investments:	1d	80,805.00
5	Dividends and interest from securities:		5,000.00

Submitted on 3/21/04 to IRS Falls Church NY 00501 Rev. Kenneth J. ...

APR 27 04

Financial Info

FINANCIALS

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

FINANCIAL DOCUMENTS

Download Audited Financials

Yes, financials were audited by an independent accountant.

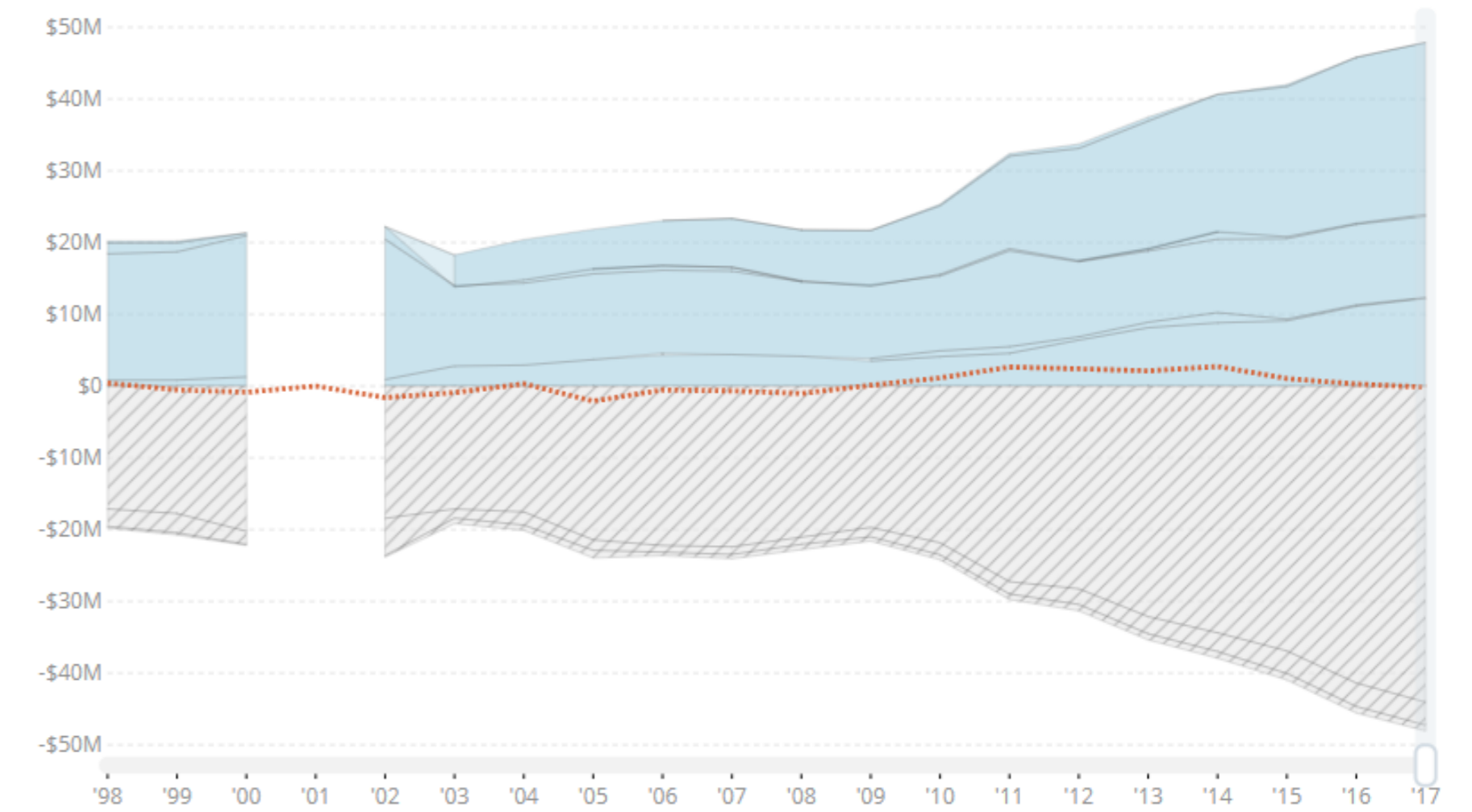
Revenue vs. Expenses

Source: IRS Form 990
2017 Breakdown

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

Total Revenue:	\$47,875,812
Contributions:	\$12,235,019
Gov't Grants:	\$106,647
Program Services:	\$11,296,509
Investments:	\$285,384
Special Events:	\$0
Sales:	\$23,940,492
Other:	\$11,761

Total Expenses:	\$48,040,063
Program Services:	\$44,049,823
Administration:	\$3,201,461
Fundraising:	\$788,779



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

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%

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

- Compensation
- Other
- Related

CATHERINE A MELOY PRESIDENT & CEO	\$402,382 \$124,534 \$0
ROSA PROCTOR CHIEF FINANCIAL OFFICER	\$228,021 \$38,257 \$0
MICHAEL FROHM CHIEF OPERATING OFFICER	\$175,549 \$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	

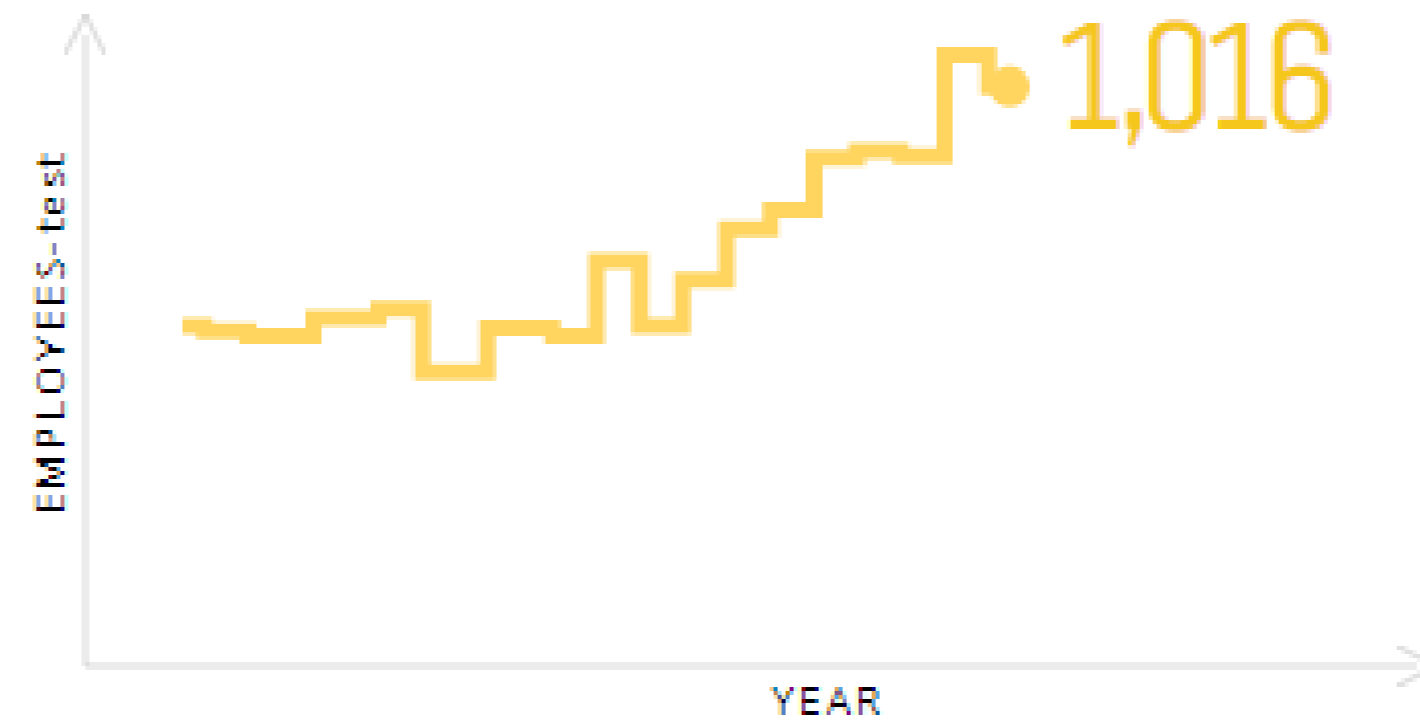
President & CEO

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



Seals of Transparency



Keep basic contact and program information up to date **so you can be found**



Provide financial information **so you can grow trust**



Describe your goals and strategies **so you can tell others about your work**



Share your measures of progress + results **so you can show the difference you're making**

Grow your online identity

Claim your profile so you can:

- Update your organization's information on [guidestar.org](https://www.guidestar.org)
- Send fresh information to 200+ charitable sites, including **AmazonSmile, Facebook, and Network for Good**
- Add a **Donate button** directly to your profile
- Save time on your grant applications
- Celebrate your diversity and share your staff & board's demographics
- And much more



Candid data partner network

Social Media
& Tech



Giving
Platforms



Financial
Institutions



Grants
Management



Media &
Researchers



Other



help.guidestar.org



[Go to GuideStar](#)

Advice and answers from the GuideStar Team

Search for articles...



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Home



GuideStar by Candid

1.77K subscribers

Questions?

Thank you.

Krista.BerryOrtega@Candid.org

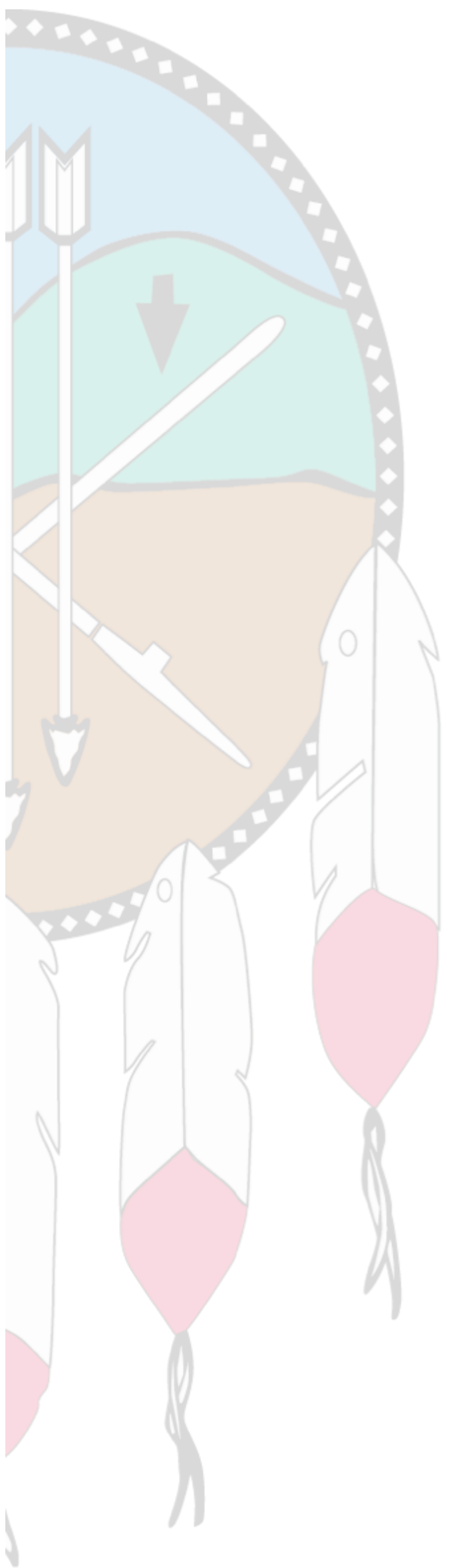
Laura.Bergman@Candid.org

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bit.ly/CandidLearningNewsletter





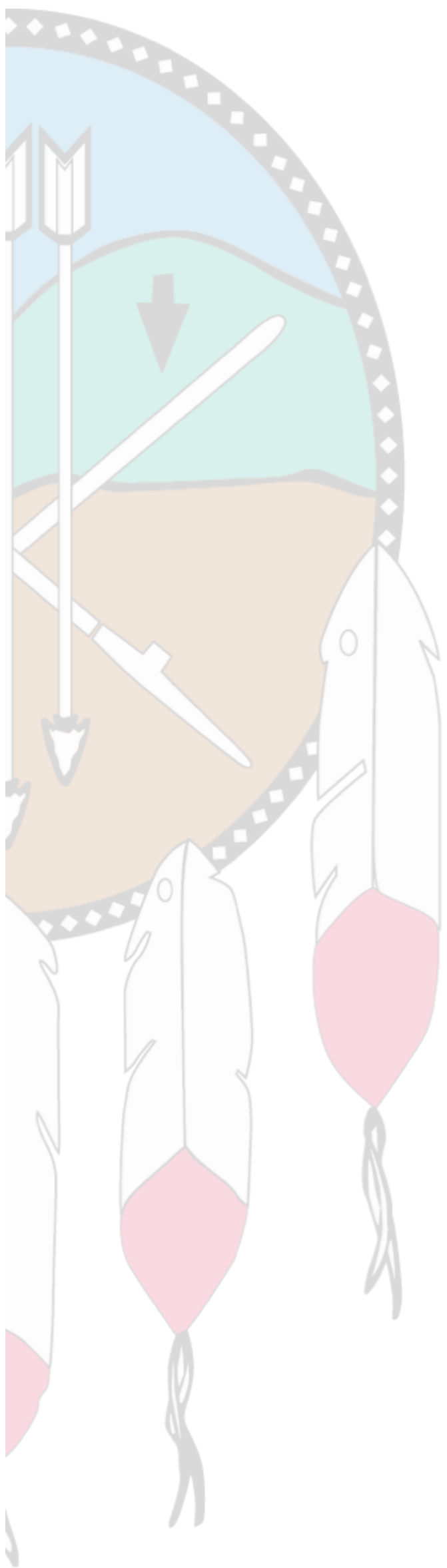
Announcements

www.sanmanuelcares.org

Next Webinar

Establishing a Healthy Grant Portfolio

- **Date:** Wednesday, October 7, 2020
- **Time:** 10:00 a.m. – 11:00 a.m.
- **Presenters:** San Manuel's Strategic Philanthropy Team



Thank you!
