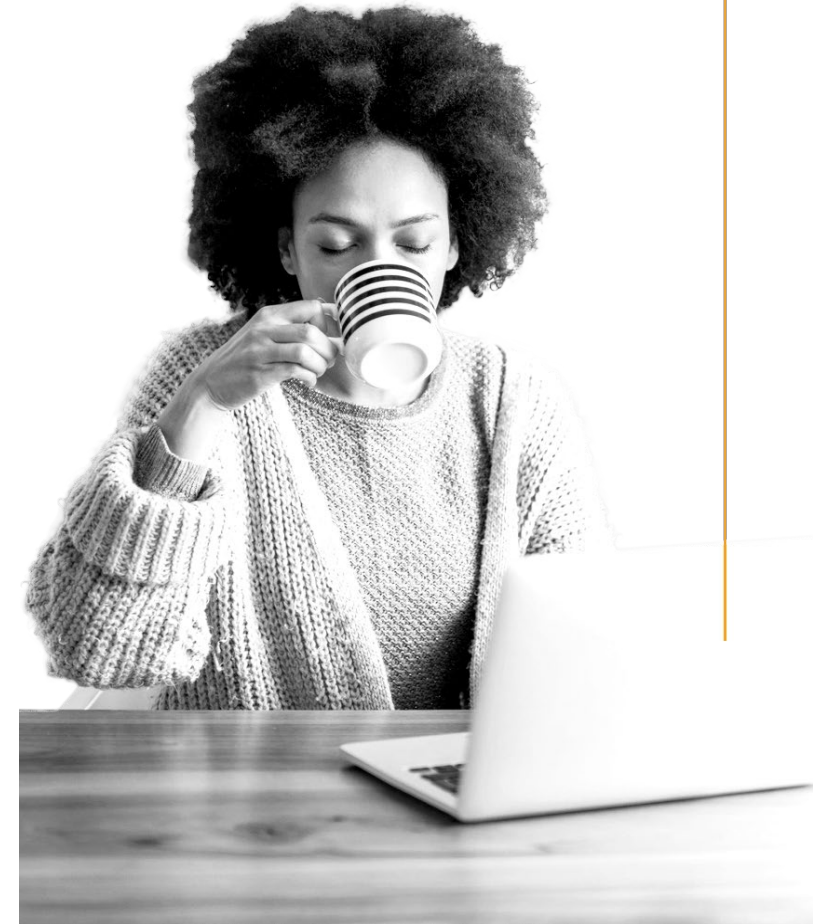


Welcome

We'll be getting started momentarily.

Get comfortable
and ready to learn!



Stories + Numbers:

Updating your nonprofit's Candid Profile (Part I)

San Manuel Band of Mission Indians

September 22, 2022

Presenter



Dave Holmes

Network Engagement
Manager
he/him/his



Lori Guidry

Network Engagement Manager
she/her/hers

Candid.

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 gets you the information you need to do good.



Candid.



Who we are

- 200+ employees, including one of the largest teams of technologists and data scientists in the social sector.
- Candid's data tools for nonprofits, foundations, and grants are the most comprehensive in the world.
- Resources include Candid profiles, GuideStar Pro, Foundation Directory, APIs, Candid Learning.
- Funding Information Network of nearly 400 libraries, community foundations, and nonprofit resource centers.
- We provide data to over 400 partners within the social sector and more broadly.

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:

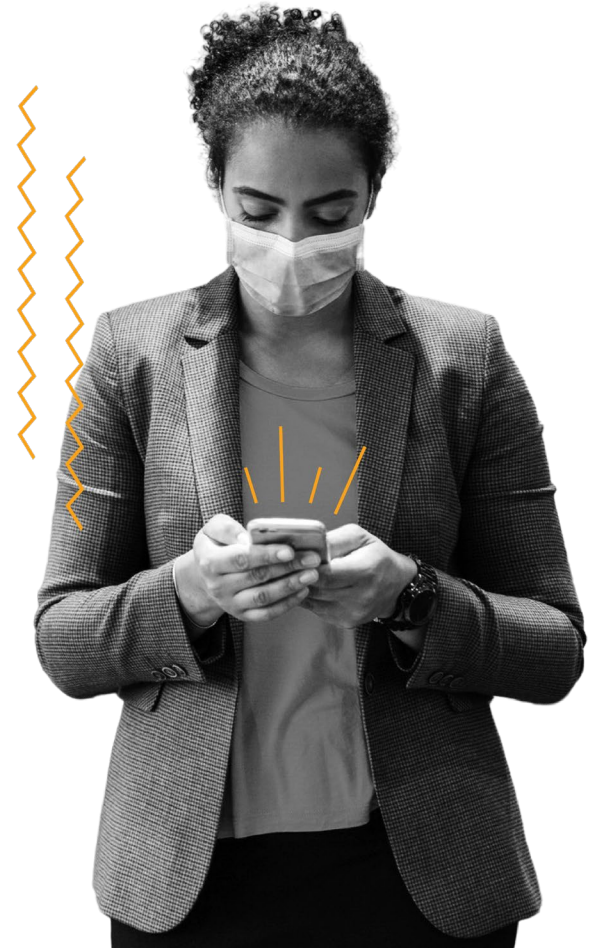
bit.ly/CandidResourcesCOVID19

Learn more about racial equity resources here:

bit.ly/CandidRacialEquity

Learn more about the response to the Ukrainian Crisis here:

<https://bit.ly/CandidResourcesUkraine>

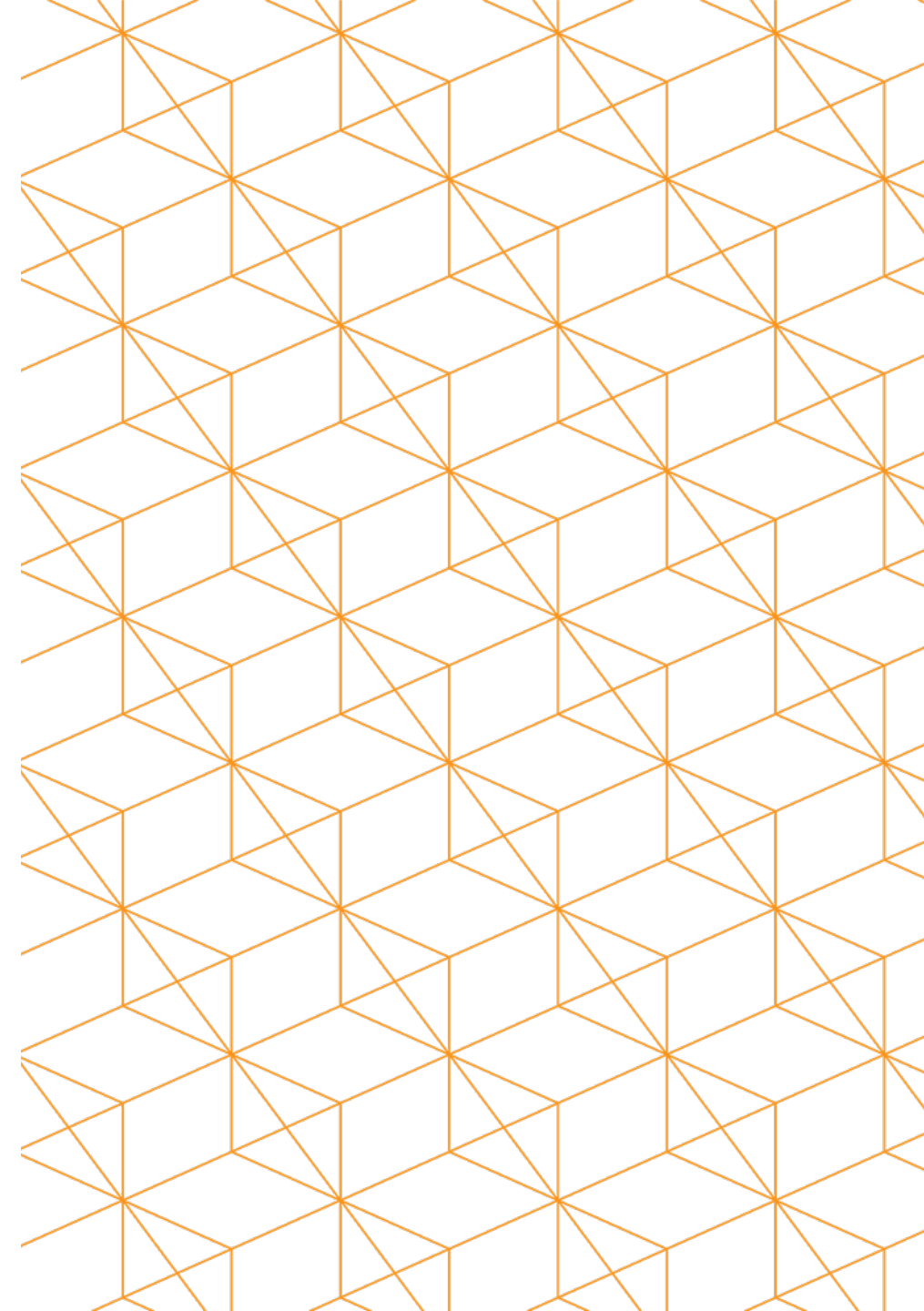


Thank you!

Thanks to the San Manuel Band of Mission Indians for organizing this training session!

Agenda

1. The problem
2. The solution
3. How Candid can help
4. What's a Candid profile?
5. Updating your profile
6. Planning next steps



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

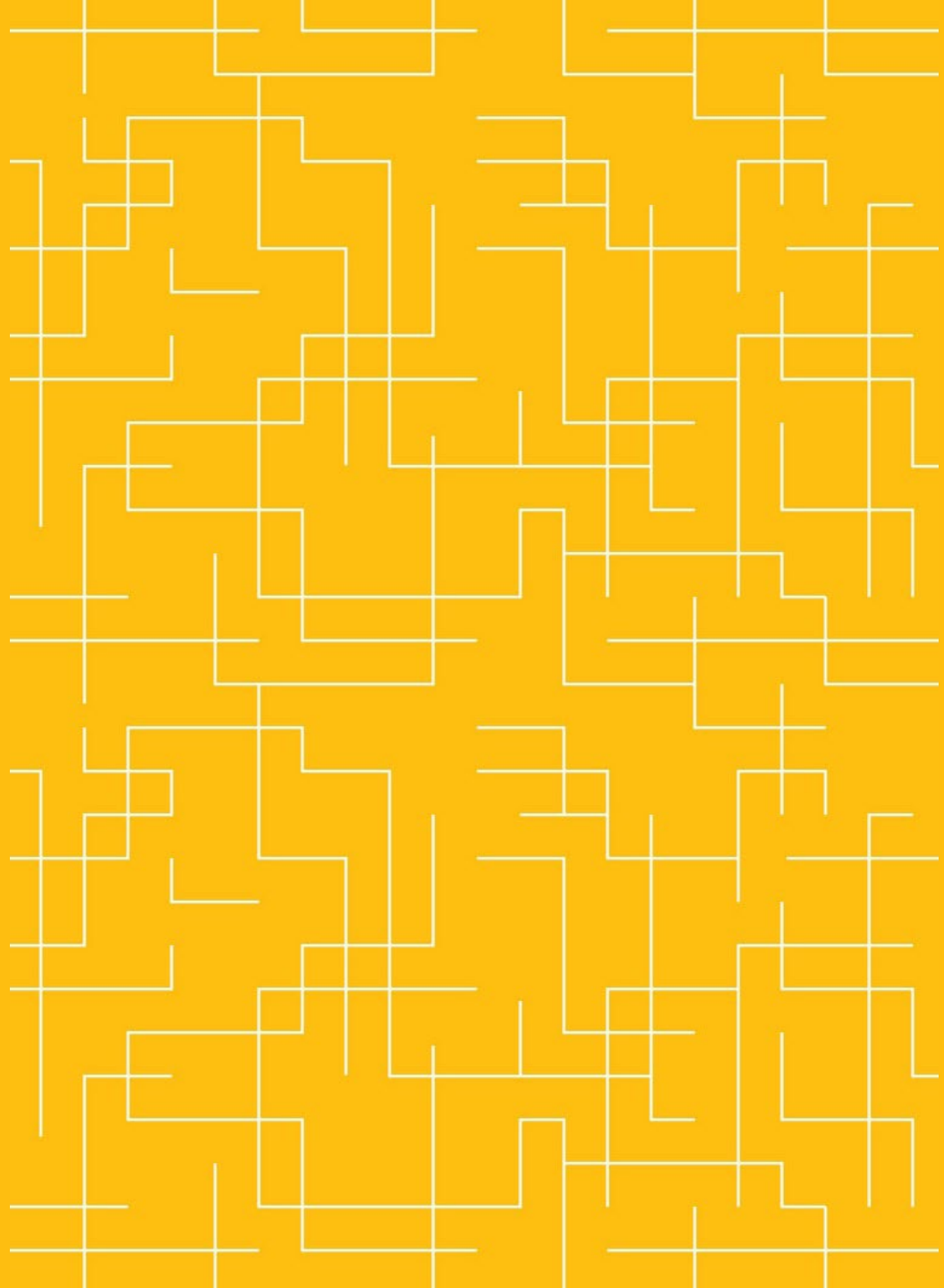
- Explain how Candid profiles increase transparency in the social sector
- Tell your nonprofit's story to potential donors and funders using your profile
- Communicate your nonprofit's impact using your Candid profile
- Identify next steps for updating your nonprofit's Candid profile

Icebreaker

In chat, introduce your organization and the most successful thing you've done to share out your impact.

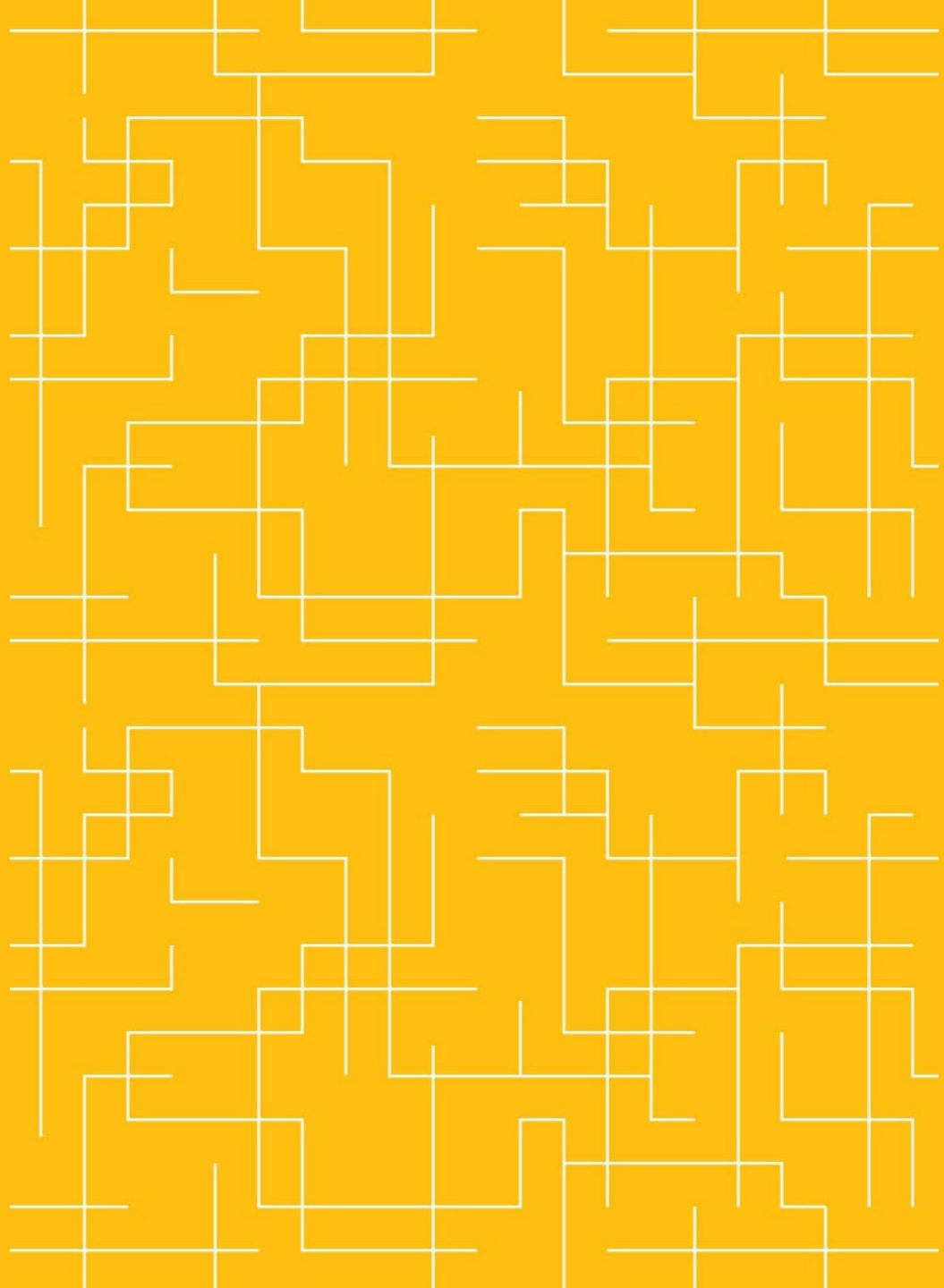
Pop quiz #1

How many active nonprofits are there in the United States?



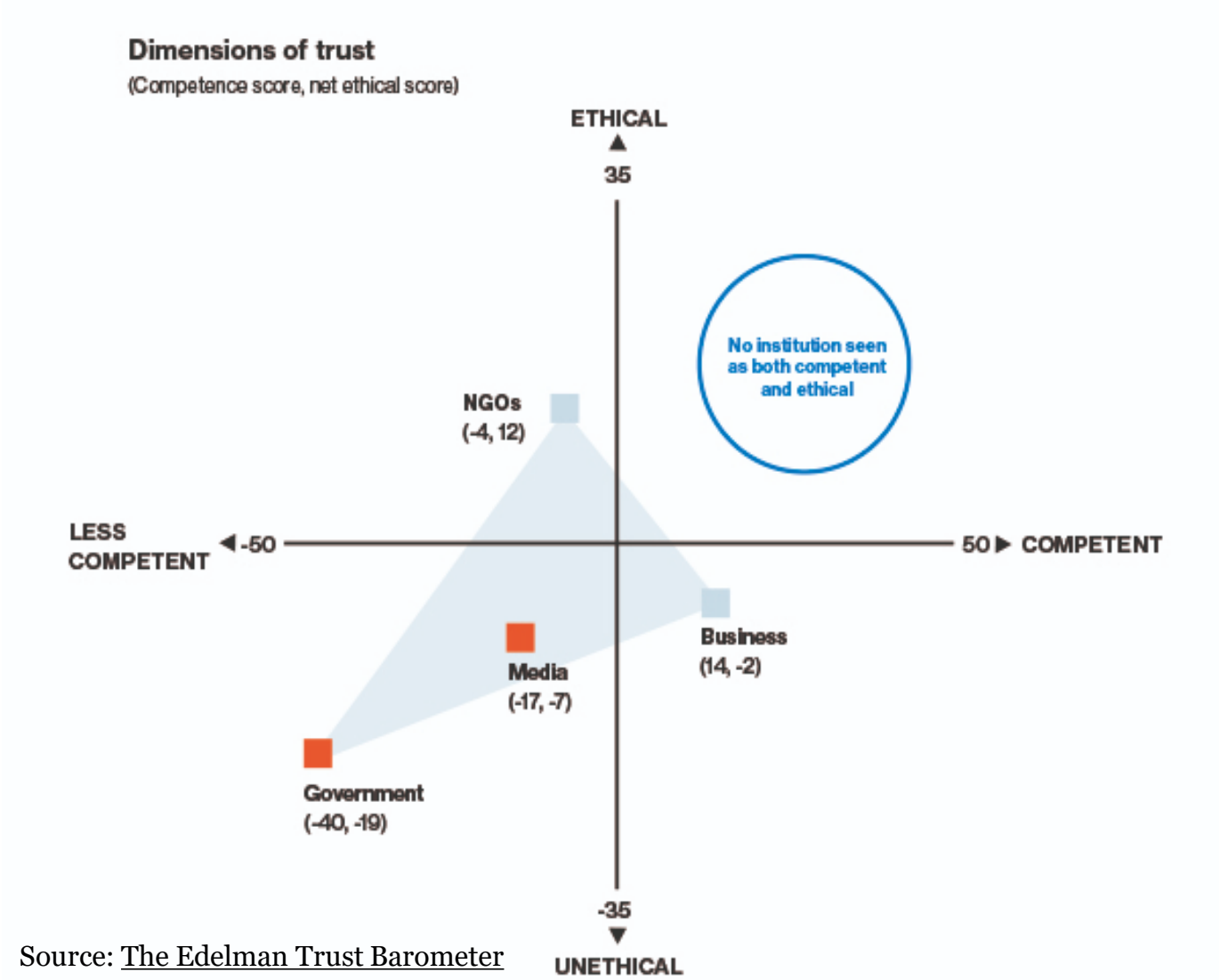
Pop quiz #2 & #3

How many active
nonprofits are there in
California? In Nevada?



The problem

Trust in nonprofits is low



How did we lose trust?

Donors' top reasons for mistrusting nonprofits are greed and high compensation, a negative reputation, and lack of honesty and transparency.

How can we grow trust?

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

**No stories without numbers and
no numbers without stories.**

HFLA of Northeast Ohio



HFLA of Northeast Ohio Platinum

Hebrew Free Loan Association

Beachwood, OH | EIN: 34-0281800 | 501(c)(3) Public Charity
GuideStar Charity Check: Pub78 Verified

The mission of *HFLA* of Northeast Ohio is to provide interest-free loans to address the financial challenges of residents of Northeast Ohio who lack access to traditional lending sources. Vision Empower individuals of ...

[See GuideStar Charity Check](#) | [See related lists](#)

☆ Save ↓ Download ✂ Add to Peer Analysis

TOTAL REVENUE ⓘ
\$1,264,465

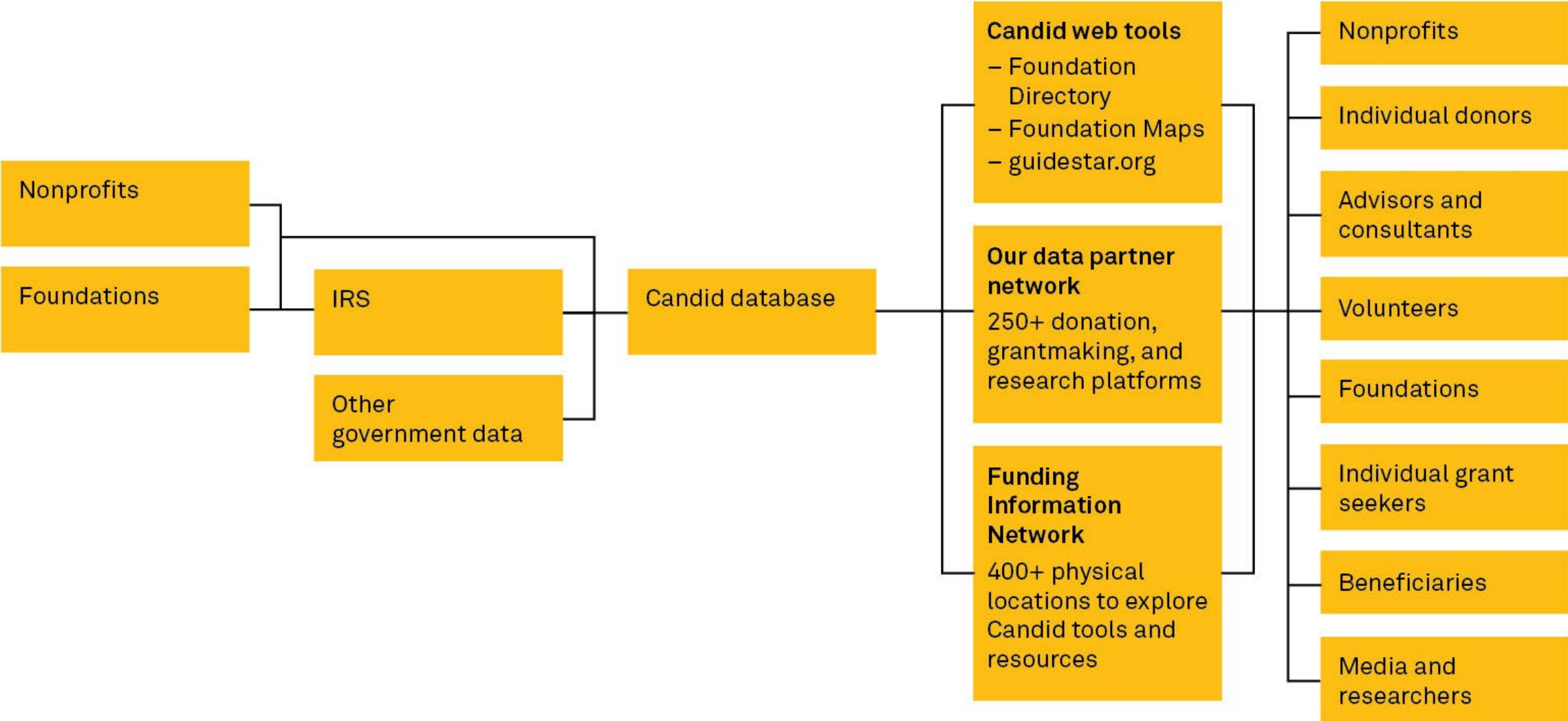
GROSS RECEIPTS ⓘ
\$1,264,465

ASSETS
\$2,862,936

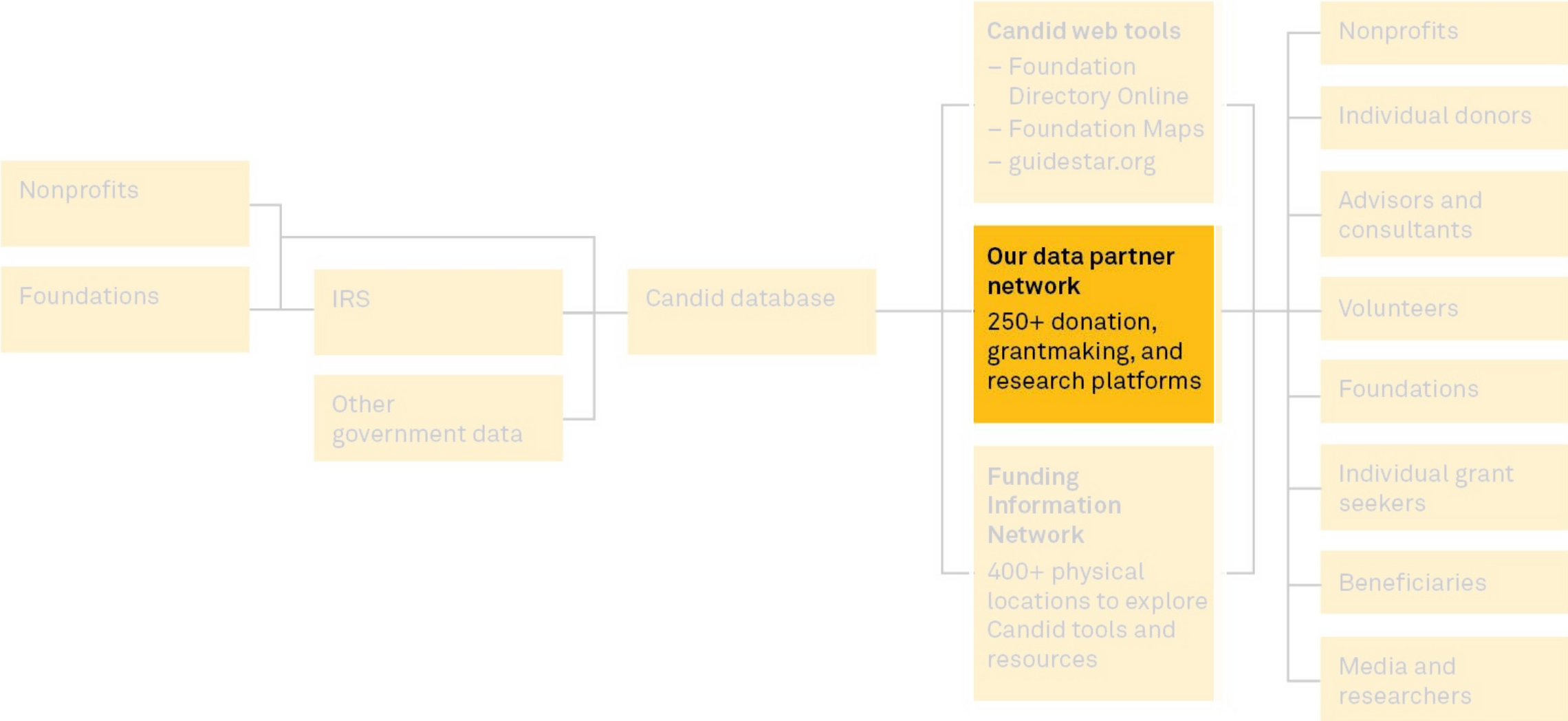
**No stories without numbers and
no numbers without stories.**

How Candid can help

Social sector data flow



Social sector data flow



Candid data partner network

Social Media
& Tech

Google
for Nonprofits



amazon smile



salesforce.org

Your Nonprofit Profile info on Facebook

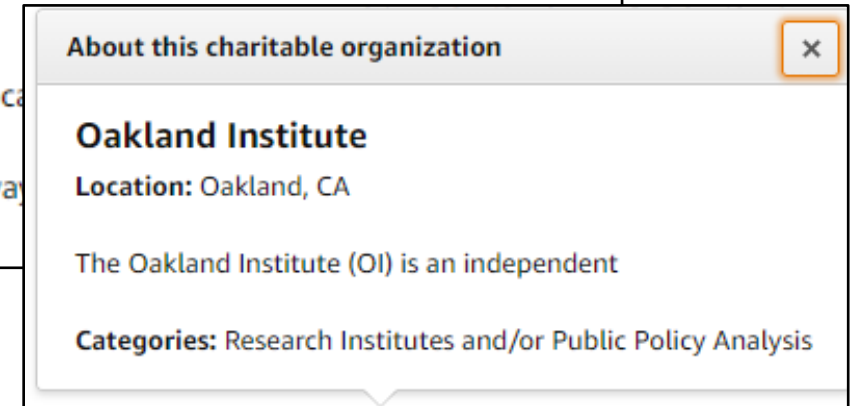
- More than \$6B raised on Facebook and Instagram
- 480 million users follow a nonprofit page on Facebook
- Facebook directs potential donors to your profile for more information
- More than 386,000 donors did this last year
- Including over 60,000 just in November 2021

The screenshot displays a Facebook fundraiser page for 'For Linus', organized by Christine Lee Barr. The page is for the Long Island Bulldog Rescue (LIBR). Key elements include:

- Header:** Search bar, user name 'Sarah', and navigation icons.
- Left Sidebar:** 'Fundraisers' section with 'For Linus' selected, and a '+ Raise Money' button.
- Main Content:**
 - For Linus:** Fundraiser for Long Island Bulldog Rescue by Christine Lee Barr.
 - Donate:** A green 'Donate' button with options to 'Invite', 'Share', and 'More'.
 - Progress:** A green progress bar showing '\$11,131 raised of \$11,000'.
 - Story:** A text post from Christine Lee Barr dated February 21, 2017, describing an auction for 'LulaRoe' leggings and mentioning the rescue's mission.
 - Donation Options:** A section titled 'How much would you like to donate?' with buttons for '\$50', '\$100', '\$200', '\$250', 'Other', and a 'Donate' button.
 - Benefiting:** A section with a photo of a bulldog and the 'Long Island Bulldog Rescue' logo.
 - Organization Info:** 'Long Island Bulldog Rescue', 'US 501(c)3 Nonprofit Organization', and a mission statement: 'The mission of Long Island Bulldog Rescue (LIBR) is to provide education, prevention, intervention, and adoption... See More'.
 - Engagement:** '63,631 people like this', 'Based in Stony Brook, New York', and 'Learn more at Guidestar.org'.
- Right Sidebar:**
 - Be the first of your friends to donate!** 309 donated, 2.2K invited, 208 shared.
 - Invite Friends:** A list of friends to invite, including Kathleen Kowal, Ramuné Rastonis, and Mary Beth Majoros.
 - Organized By:** Christine Lee Barr, 'On Facebook since 2009', with 556 friends.
 - Fundraiser Questions:** A list of questions like 'How do nonprofits receive donations?' and 'Can I donate privately?'.
 - Language:** English (US), Español, Português (Brasil), Français (France), Deutsch.
 - Footer:** Privacy, Terms, Advertising, Ad Choices, Cookies, More, Facebook © 2017.

Example: Your profile info on AmazonSmile

- More than \$215 million donated to charities as of 2020
- Enables AmazonSmile users to access any IRS-recognized nonprofit
- Candid handles maintenance and updates to the database



Candid data partner network

Tech
giants



Google
for Nonprofits

Donor Advised
Funds



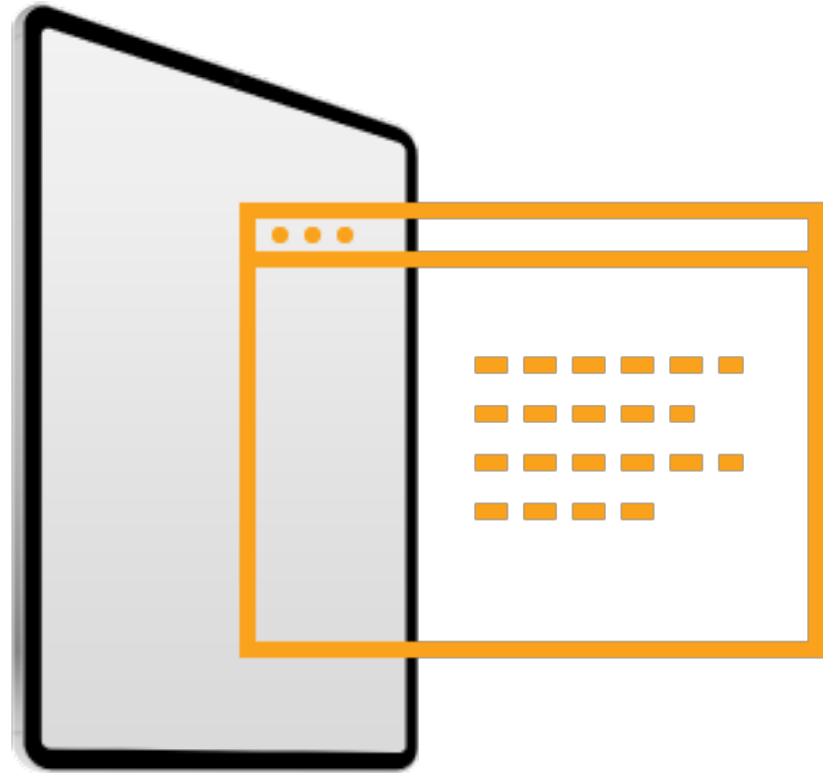
FIDELITY CharitableSM



National
Philanthropic
Trust

Example: Your profile info on Fidelity

- Over \$9B in donor-recommended grants made in 2020
- Within their account, donors can
 - search for your nonprofit, and
 - see your full Candid profile



Candid data partner network

Tech
giants



Google
for Nonprofits

Donor Advised
Funds



FIDELITY Charitable™



Giving
Platforms



Grants
Management

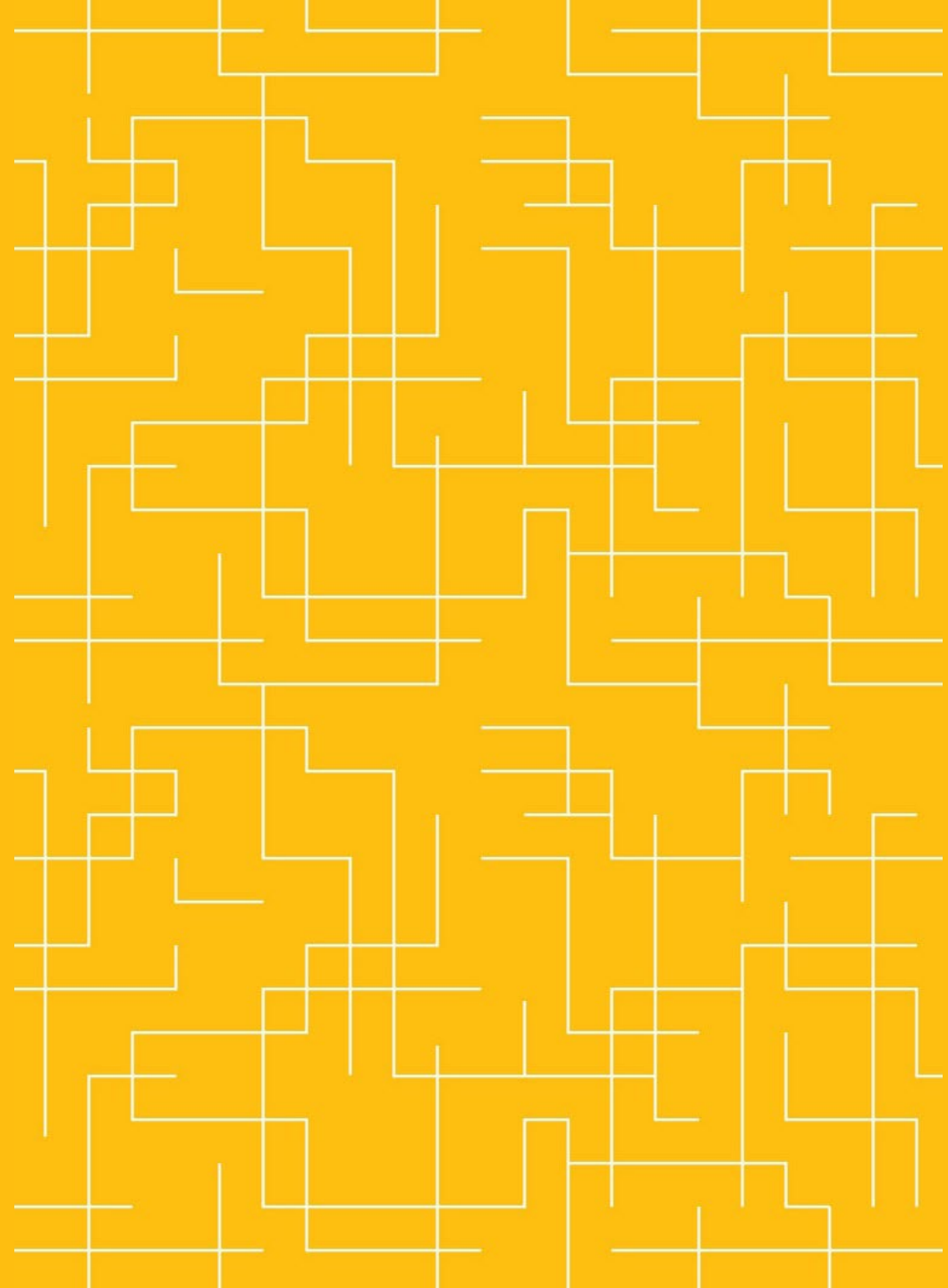


What's a Candid Profile?

Hint: It's part of the solution.

Pop quiz #4

How many nonprofits in
California and Nevada
have a Candid profile?



IRS Forms 990

Important because...

- Comprehensive
- Standardized
- Basic information

Frustrating because...

- Old data
- Too general
- No good program info

(ORIGINAL) 12/31/2003 *(ORIGINAL)* EIN 13-3566610

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)

Department of the Treasury Internal Revenue Service

OMB No. 1545-0047

2003

Open to Public Inspection

A For the 2003 calendar year, or tax year beginning 1-1-2003 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 INT'L (WORLD RELIGIOUS COUNCIL)
 Number and street (or P.O. box if mail is not delivered to street address): PO Box 1173 (PO Box 1173)
 City or town, state or country, and ZIP+4: SARANAC LAKE, NEW YORK 12983

D Employer identification number: 13-3566610

E Telephone number: (518) 891-5466

F Accounting method: Cash Accrual
 Other (specify):

G Web site: *(ORIGINAL)* ARCHIVE: 107 Scribner Ave. SE., NY 10301, ELSEWHERE

H and I 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: Yes No

H(c) Are all affiliates included? Yes No (If "No," attach a list. See instructions.)

H(d) Is this a separate return filed by an organization covered by a group ruling? Yes No

J 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.

L Gross receipts: Add lines 8b, 8c, 9b, and 10b to line 1. *(ORIGINAL)* \$ 1,140,500.00

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	\$ 2,080,500.00
b	Indirect public support	
c	Government contributions (grants)	
d	Total (add lines 1a through 1c) (cash \$ 2,080,500.00 noncash \$ 600,000.00)	\$ 2,680,500.00
2	Program service revenue including government fees and contracts (from Part VII, line 93)	
3	Membership dues and assessments	
4	Interest on savings and temporary cash investments	
5	Dividends and interest from securities	
6	Other revenue	
7	Expenses (including depreciation and amortization)	
8	Net assets or fund balances at beginning of year	
9	Net assets or fund balances at end of year	

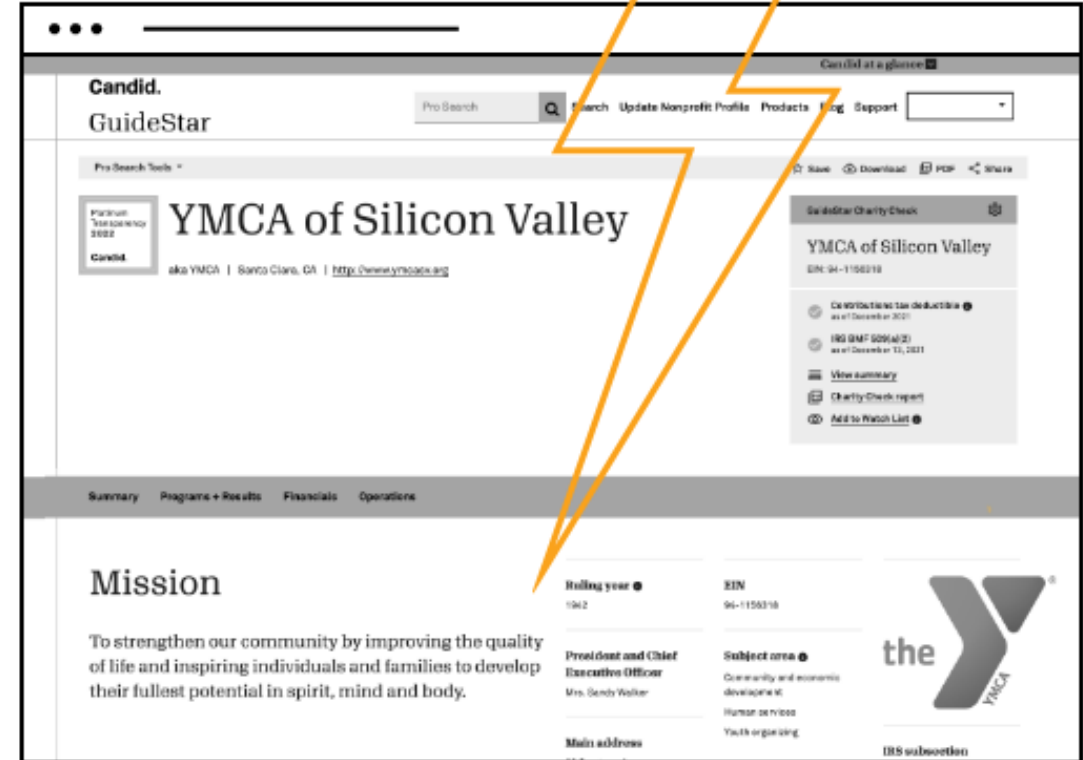
3/2/04
 To IRS
 Falls Church
 NY
 00501
 Rev. Kimmel
 P.O. Box
 10/14

APR 27 '04

\$ 808,050.00
 \$ 240,000.00
 \$ 13,500.00
 \$ 500.00

Candid Profiles

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



The image shows a screenshot of a web browser displaying a profile on the Candid platform. The profile is for the YMCA of Silicon Valley. The page layout includes a header with the Candid logo and a search bar. Below the header, there is a navigation bar with options like 'Save', 'Download', 'PDF', and 'Share'. The main content area features the organization's name, 'YMCA of Silicon Valley', along with its EIN (94-1156218) and a link to its website. A sidebar on the right contains a 'Candid Charity Check' section, which includes a 'View summary' link and a 'Charity Check report' link. Below the main content, there is a 'Mission' section with the text: 'To strengthen our community by improving the quality of life and inspiring individuals and families to develop their fullest potential in spirit, mind and body.' To the right of the mission statement, there is a table of key information:

Holding year	1942	EIN	94-1156218
President and Chief Executive Officer	Mrs. Sandy Walker	Subject area	Community and economic development Human services Youth organizing
Main address		IRS subsection	

The YMCA logo is visible in the bottom right corner of the profile page.

The 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



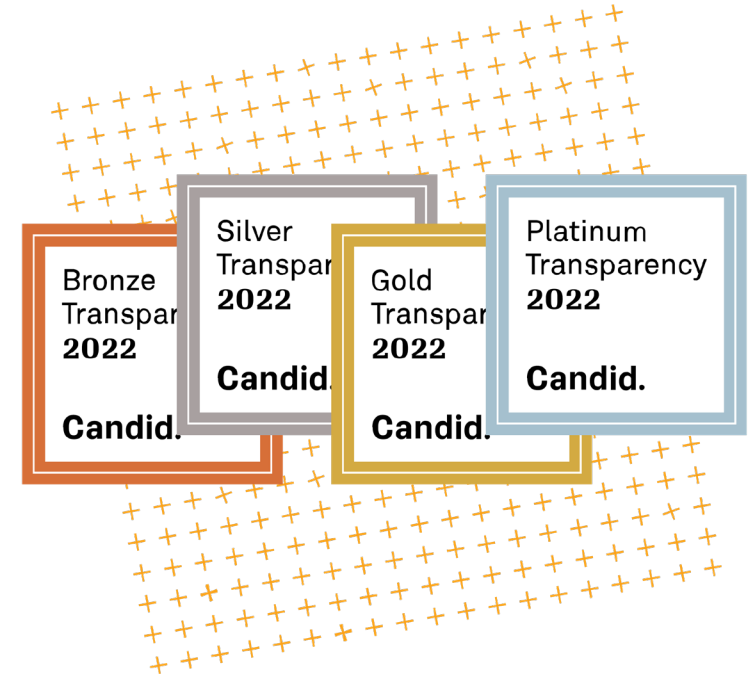
Provide financial and leadership information
to gain trust and support



Share your measures of progress + results
to highlight your impact

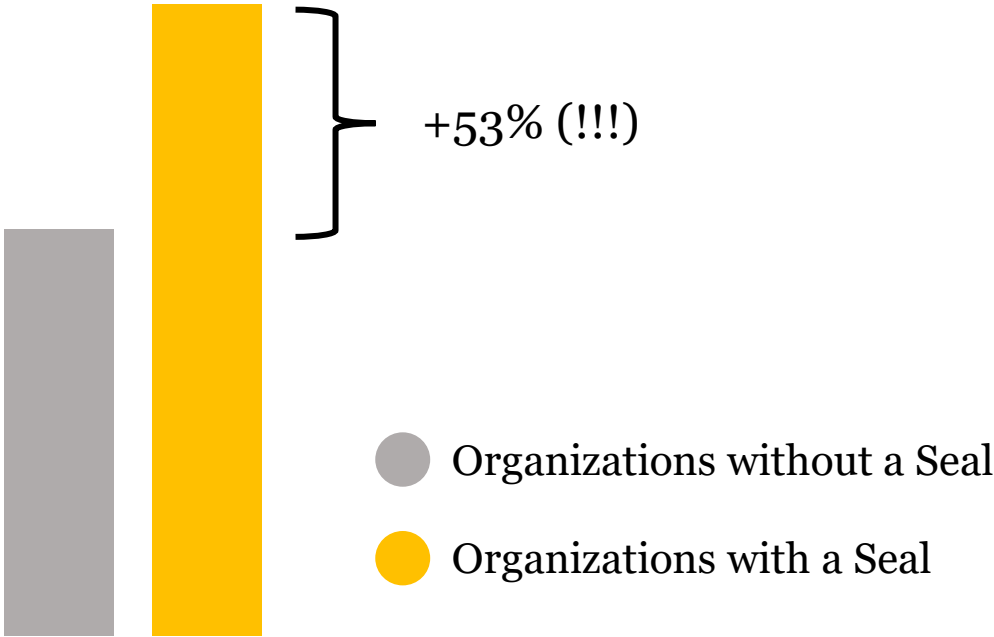
Benefits to earning a Seal

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



It turns out that transparency pays off

Year over year contributions to nonprofits



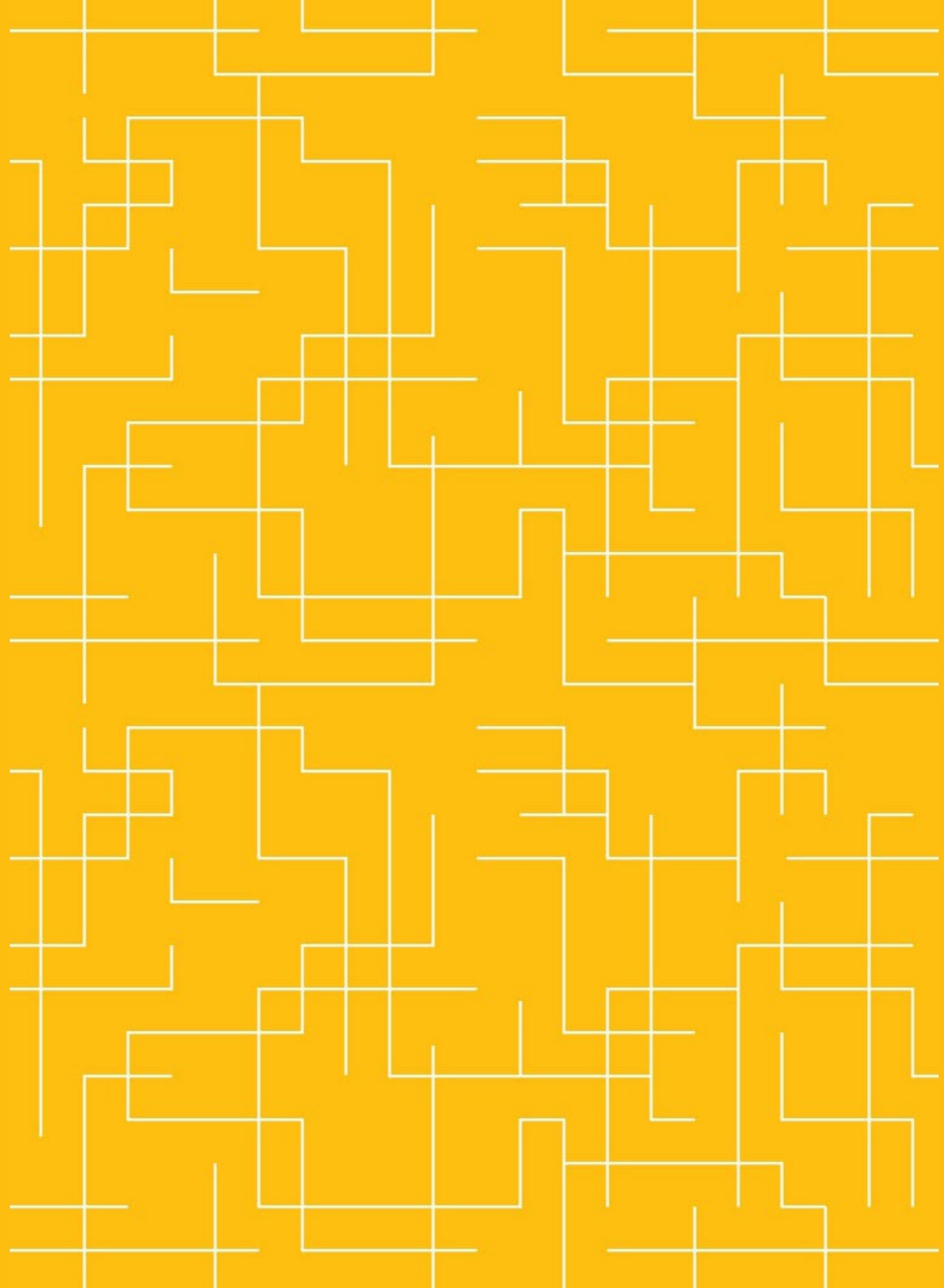
Source: Villanova University research published in accounting journal, linking earning a Seal of Transparency to more contributions. Learn more at guidestar.candid.org/transparency/

Pop quiz #5

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

Bronze
Transparency
2022

Candid.



Updating your Nonprofit Profile

Have you claimed your nonprofit profile?



The screenshot shows a GuideStar profile for 'ANIMAL-RELATED NONPROFIT USA' located in CLOUDCROFT, NM. The profile includes a 'SUMMARY' tab and a 'MISSION' section stating that the organization has not provided a mission statement. Key details include: Ruling Year 2017, EIN 38-4024118, IRS Subsection 501(c)(3) Public Charity, Principal Officer Donna Ranz, Main Address PO BOX 904 CLOUDCROFT, NM 88317, Cause Area (NTEE Code) Animal Protection and Welfare (includes Humane Societies and SPCA's) (D20), NACCS Code 813312 Environment, Conservation and Wildlife Organizations, and SIC Code 8099 SOCIAL SERVICES, NEC 8099 MEMBERSHIP ORGANIZATIONS, NEC.

Earn Bronze in 5 minutes or less



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

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

****Important Note****

If you do nothing else, please make sure your payment/billing address is up to date. Our partners want to get you your hard-earned donations.

Bronze: Share your mission statement

Tip: Your mission statement should be **no longer than 2 sentences.**

For further guidance on drafting a mission statement, check out our [“Where can I learn more about nonprofit mission statements?”](#) Knowledge Base Article.

Mission

Candid gets you the information you need to do good.

Notes from the nonprofit

Foundation Center was the largest source of information about philanthropy globally, and GuideStar was the largest source of information on U.S. nonprofit organizations. In 2019, the two organizations joined forces to become Candid, enabling us to enhance the services we offer to the millions of people who rely on us to help them make the world a better place. Please note, this profile will continue to maintain historic data on Foundation Center's financials, annual reports, and organization demographics. For information on GuideStar's financials and organization demographics, please visit GuideStar's legacy profile (EIN: 54-1774039).

Ruling year ⓘ
1957

Chief Executive Officer
Ms. Ann Mei Chang

Main address
32 Old Slip 24th Floor
New York, NY 10005 USA

[Show more contact info](#)

Use our Help Center

- Go to help.guidestar.org
- Find the [collection of articles on “How to update your Nonprofit Profile”](#)
- Check out the [“How to Earn a Bronze Seal of Transparency” help article](#)

Your turn!

- Review and enter Bronze information
- If you have a Bronze seal, add a donation button to your profile
- If your organization has a website, make sure it appears on your profile
- Tell your story using the Social Media, Photos & Videos section
- Complete the “Board practices” and “How we listen” sections

Planning next steps

Earn Silver (~10 minute update)



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**

Silver: Share programs(s) information

- Display your top 3-5 programs.
- For each program:
 - write a 3-4 sentence description
 - be sure to complete the fields: geographic area served, population(s) served, and budget

Programs and results

[Reports and documents](#)
[Download annual reports](#) ▾
[Download other documents](#) ▾

What we aim to solve

SOURCE: Self-reported by organization

Now more than ever, open access to timely, nonpartisan data and intelligence is critical to the ability to solve increasingly complex social issues. Our field needs a data-driven institution with the... [Read more](#)

Our programs


SOURCE: Self-reported by organization

What are the organization's current programs, how do they measure success, and who do the programs serve?

Knowledge Tools	+
Data Tools	+
Grantseeker Tools	+
Training	+

Where we work

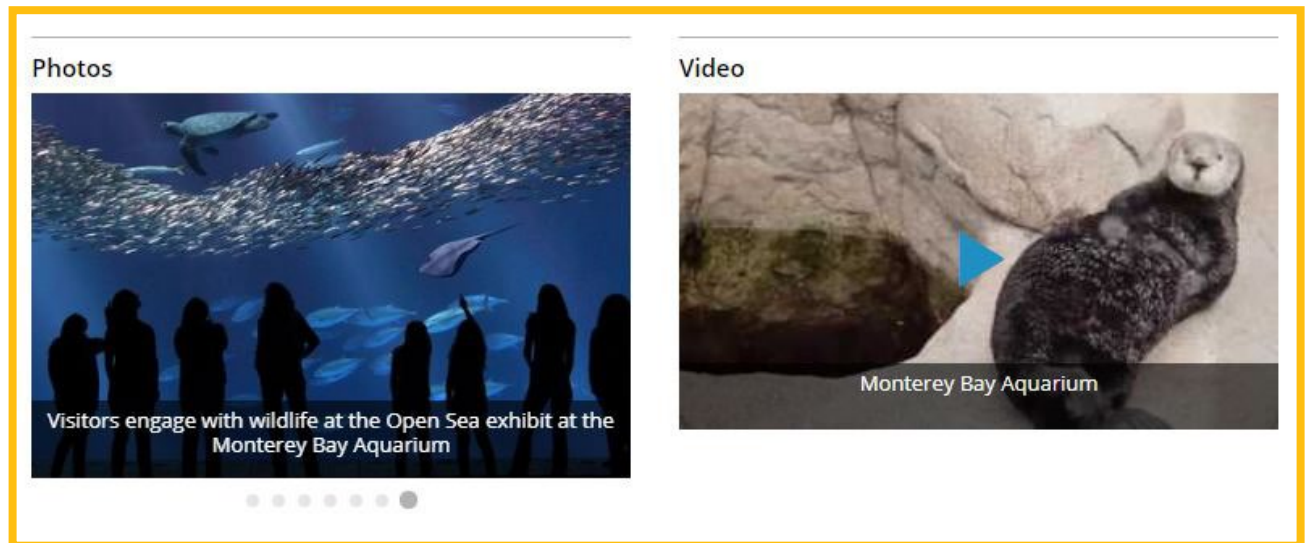
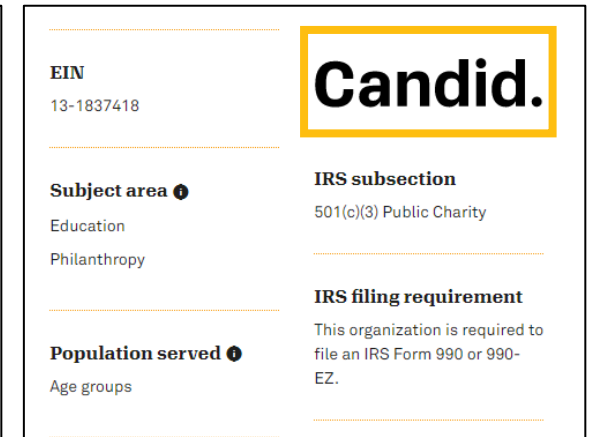
Global



A world map with orange highlights on the continents of North America, South America, Africa, Asia, and Australia. The map is titled 'Where we work' and 'Global'. There is a zoom-in icon (+) in the top left corner of the map area.

Silver: Communicate your brand

- Share the following (or indicate that you don't have):
 - Logo
 - Tagline
 - Social media usernames
- Optional: Bring your story to life using images and videos



What's next

San Manuel Webinar

Stories + Numbers Part II

Thursday, September 29

10 AM – 11:30 AM PST

Questions?

Reach out at:

david.holmes@candid.org

Thank you.

