Welcome

We'll be getting started momentarily.

Get comfortable
and ready to learn!

Candid.
Learning

#CandidLearning | learning.candid.org
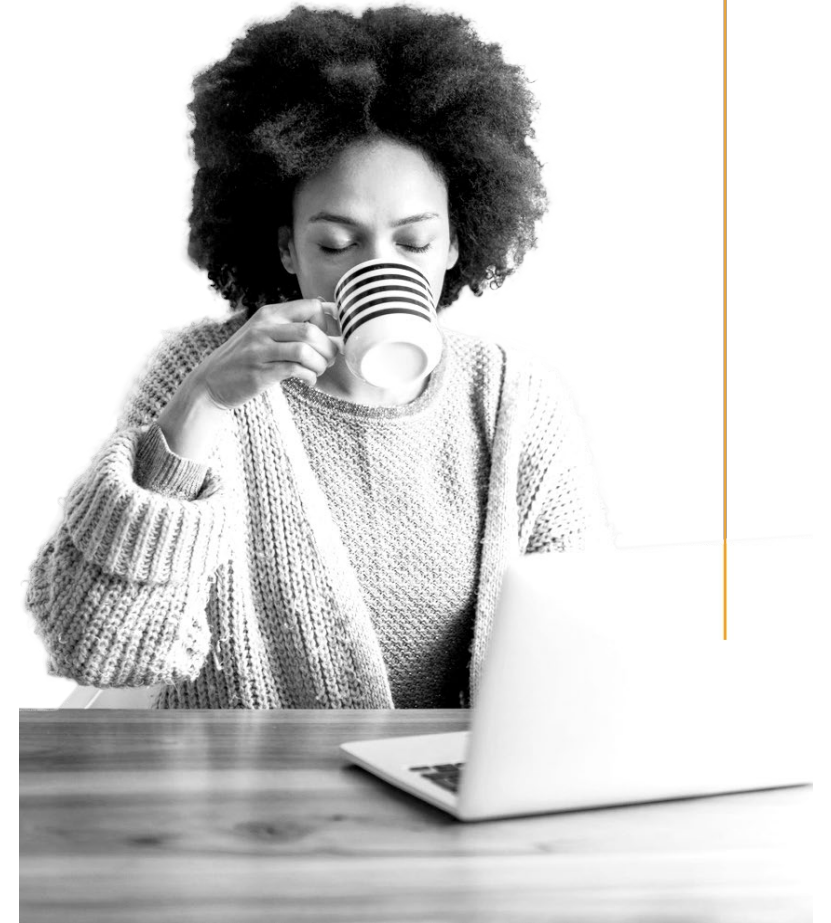
Stories + Numbers:
Updating your nonprofit's Candid Profile (Part II)

San Manuel Band of Mission Indians

September 29, 2022

Presenter

Dave Holmes
Network Engagement
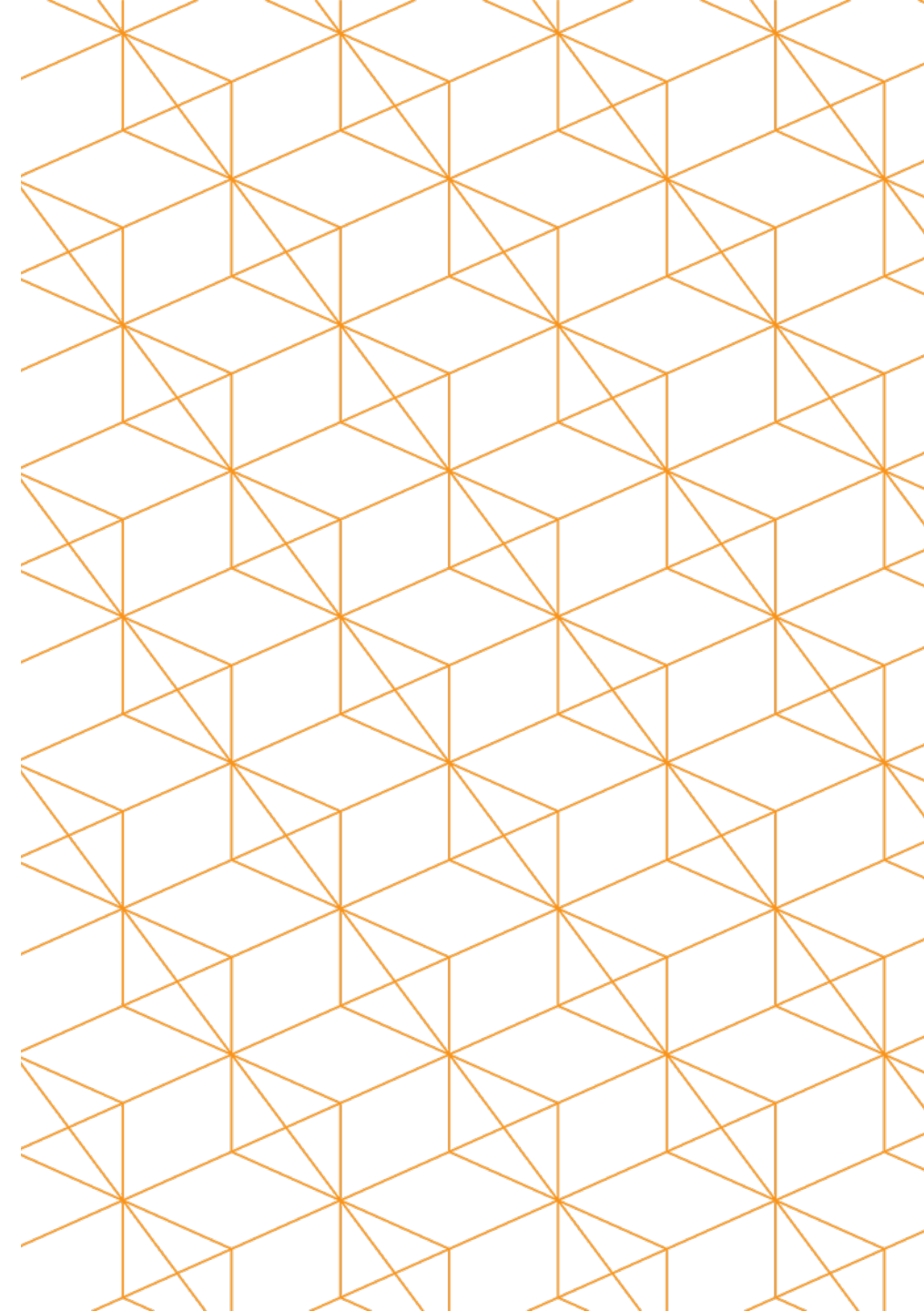Manager
he/him/his

Lori Guidry
Network Engagement Manager
she/her/hers

Thank you!

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

Agenda

Recap

Where are you with your Candid Profile?

The Seals of Transparency

Bronze Transparency 2022 Candid.

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

Silver Transparency 2022 Candid.

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

Gold Transparency 2022 Candid.

Provide financial and leadership information **to gain trust and support**

Platinum Transparency 2022 Candid.

Share your measures of progress + results **to highlight your impact**

Earn Gold

Bronze Transparency 2022 Candid.

Silver Transparency 2022 Candid.

Gold Transparency 2022 Candid.

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**

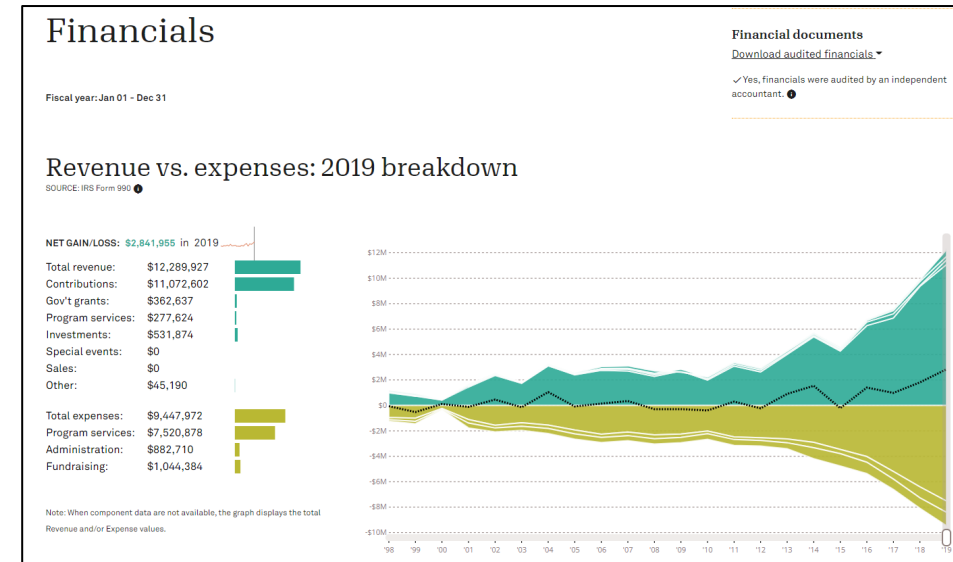Provide financial and leadership information **to gain trust and support**

Gold: Upload or enter financial info

You have two options:

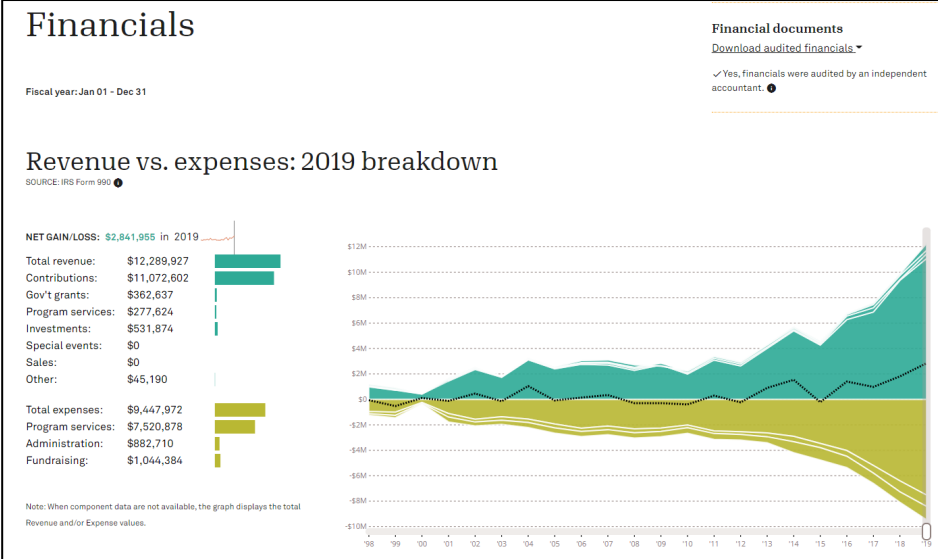— Upload an audited financial statement (from 2020 or 2021)

or

— Complete fields to share financial information

Gold: Upload or enter financial info

Tips:

- If you uploaded an audited financial statement, you can also fill in the manual fields.

- If you manually entered information, make sure your numbers match those of your most recent Form 990.

Gold: Share leadership demographics

- To earn Gold, you are asked to share the following regarding how your organization's leader, board, and senior staff self-identify:

  - Race & ethnicity (or "Decline to state")

  - Gender identity (or "Decline to state")

  - Sexual orientation (or "Decline to state")

  - Disability status (or "Decline to state")

- For further guidance regarding demographic questions, best practices, and definitions, visit bit.ly/nonprofitprofileDEI

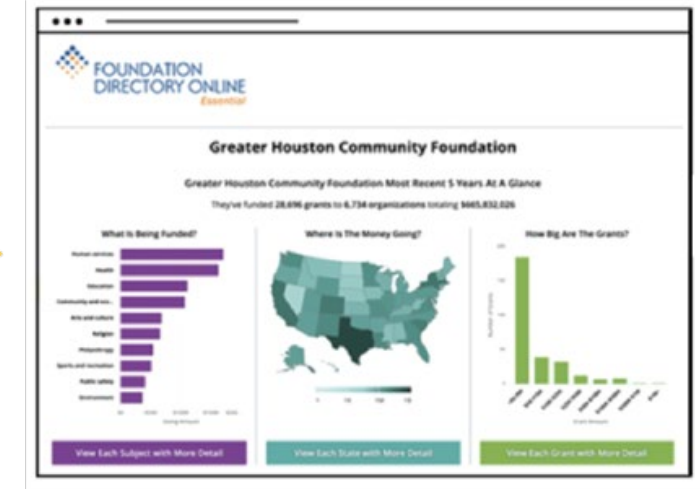# Go for Gold promotion for small nonprofits

For small nonprofits:
<$1M in annual revenue or expenses

If you earn a **2022 Gold Seal** of Transparency this year

You can get a code for a **FREE 1-year subscription to Foundation Directory Essential** to search for potential funders. To get code email goforgold@candid.org

* For qualifying nonprofits

Learn more at bit.ly/goforgold2022

Earn Platinum, the highest Seal of Transparency

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Platinum Transparency 2022 — Candid.

Share your measures of progress + results **to highlight your impact**

Platinum: Share your strategic plan

- Upload your strategic plan* <u>or</u> answer two questions:

  o   What is your organization aiming to accomplish?

  o   What are your strategies for making this happen?

* Your strategic plan must be no older than 5 years

Platinum: Share metrics and context

1. Start by displaying your top 3-5 metrics. Each metric should have 3-5 years' worth of data.

2. Include context! Provide insight for good (or bad) years or explain how your metric specifically relates to your organization.

3. Include a target population and connect to program for each metric (if applicable).

Our results

SOURCE: Self-reported by organization

How does this organization measure their results? It's a hard question but an important one.

Number of organizations you can find on GuideStar

TOTALS BY YEAR

2020	2,768,870
2019	2,869,792
2018	2,761,541
2017	2,675,783
2016	2,585,936
2015	2,489,543

TYPE OF METRIC
Output - describing our activities and reach

DIRECTION OF SUCCESS
Increasing

Number of organizations who share enough information to earn a Seal of Transparency on GuideStar

TOTALS BY YEAR

2020	74,452
2019	77,129
2018	66,602
2017	48,075
2016	36,534
2015	32,340

TYPE OF METRIC
Output - describing our activities and reach

DIRECTION OF SUCCESS
Increasing

Number of unique website visitors on GuideStar

TOTALS BY YEAR

2020	12,314,055
2019	12,900,000
2018	10,507,936
2017	8,836,577
2016	6,864,166
2015	7,146,463

TYPE OF METRIC
Input - describing resources we use
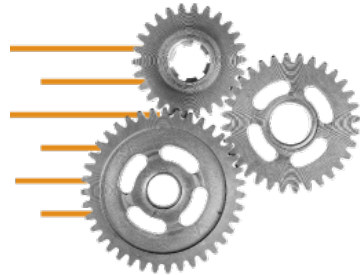
DIRECTION OF SUCCESS
Increasing

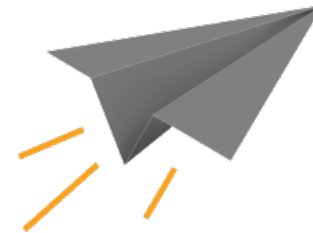# Use the <u>Common Results Catalog</u> to select metrics

1. Scan the list to help you reflect on your metrics
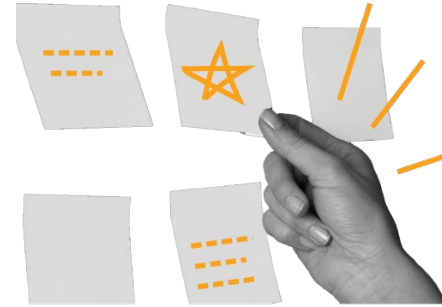
2. Pick the metrics that best fit your organization or create your own metrics

3. Enter your metrics into the Platinum section of your Nonprofit Profile

4. Millions of people accessing your profile will see your progress and results

Additional sections you can use to tell your story

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

Optional section: Board leadership practices

Answer a series of yes/no questions that speak to:

- Board education
- CEO oversight
- Board composition
- Board performance

Optional section: How we listen

Answer the following questions:

- How is your organization collecting feedback?

- How is your organization using feedback?

- With whom does your organization share feedback?

- What challenges does your organization face in collecting feedback?

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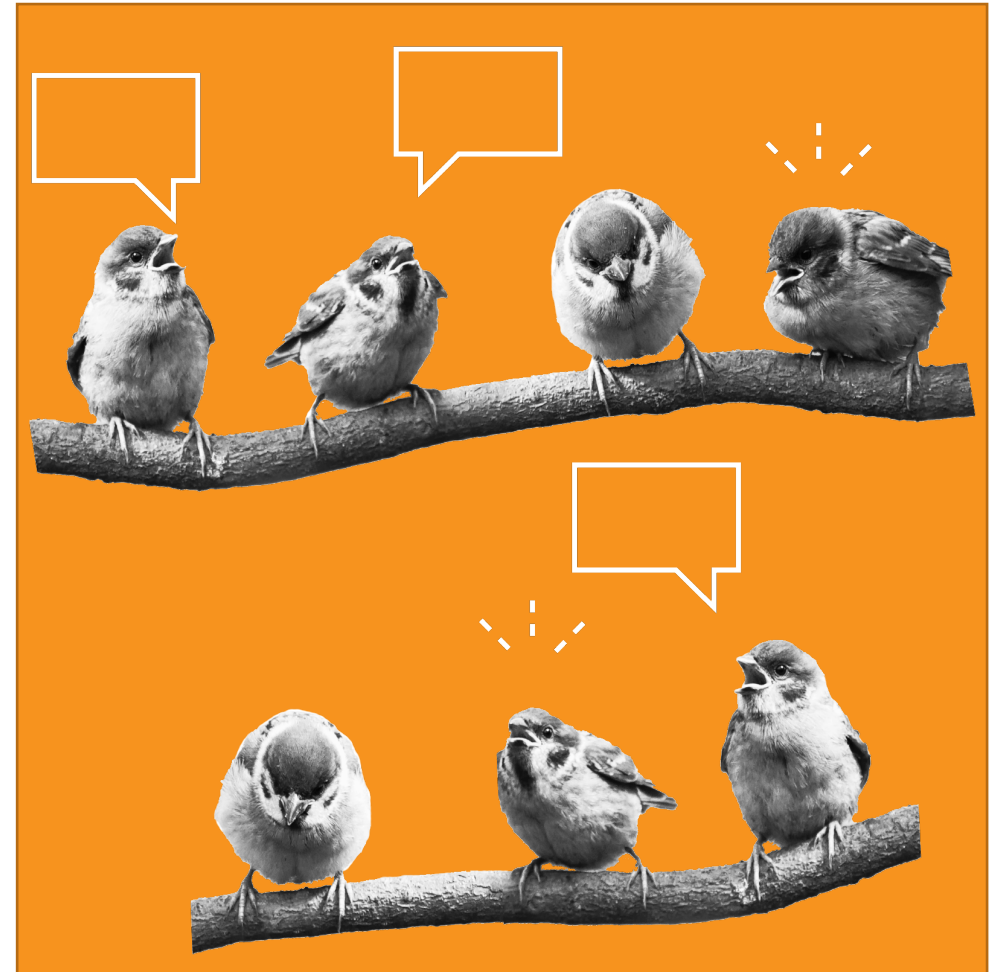
Optional section: Additional documents

In this section, you can share:

- The year your organization was founded

- Your most recent Form 990

Resources to help along the way

— Use the <u>Seals of Transparency Guide</u> to identify information you need to gather.

— Bookmark and reference <u>help.guidestar.org</u> to get answers to your questions, including connecting with our support team

— Select metrics using the <u>Common Results Catalog</u>

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What now?

— Don't forget to <u>Publish</u>!

— Invite your colleagues to update.

— Spread the word about earning your Seal(s).

Remember to publish!

- You must click the "Publish" button for your updated information to appear on your profile

- Published changes can take up to 15 minutes to show up
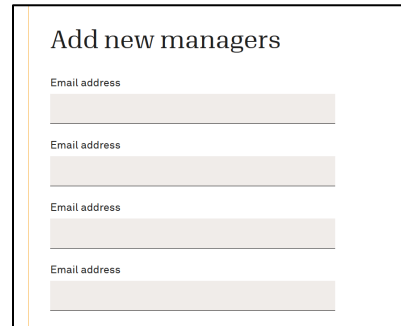
Add other managers to your Profile

1. <u>Log in</u> and select "Assign managers"
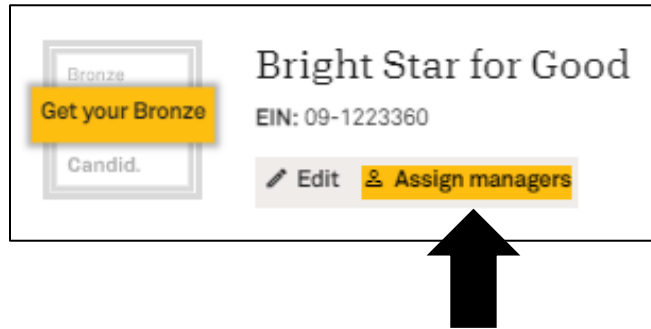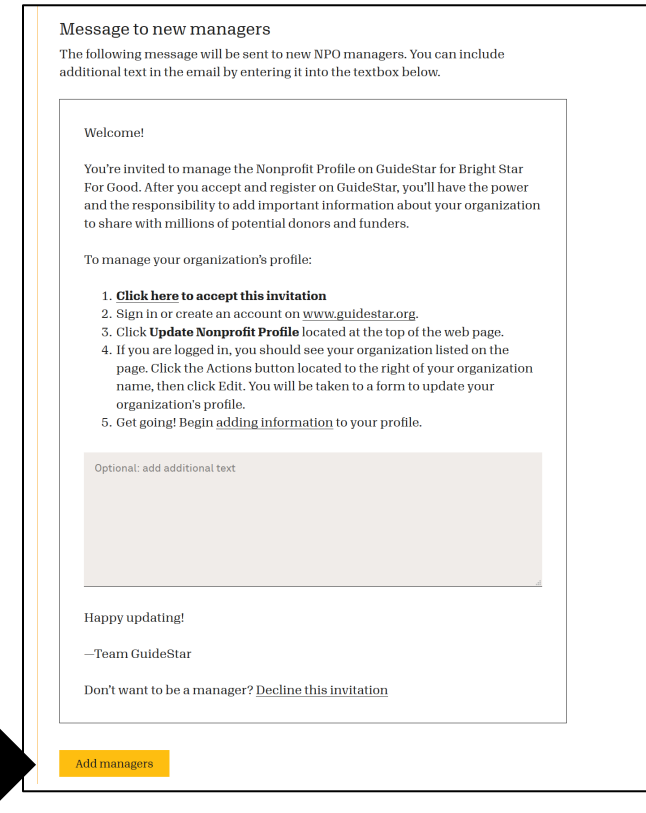
2. Enter new managers' email addresses

3. Modify the email they will receive and click the "Add Managers" button

Share your accomplishment

1. Go to "Step 3: Benefits"

2. Find resources for sharing your Seal on social media, your website, and more

No stories without numbers and no <u>numbers</u> without stories.

Thank you.

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