

# Introduction to Foundation Directory and Guidestar

# About Candid and your facilitator



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Educational Programming Manager  
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# Upon completion of this training, you'll be able to:

- Identify your needs before searching Foundation Directory
- Find prospects with a project-based search
- Evaluate if those prospects are a good fit for your needs
- Promote your nonprofit's visibility and credibility through GuideStar

# Get the Most out of Your Foundation Directory Research

# Foundation Directory

Unsurpassed in:

- Scope: 240K+ funders, 2M+ recipients, 4M+ grants added yearly
- Depth: Detailed profiles of funders, grants, recipients, companies
- Currency: Updated daily



# Data sources

- Grantmaker websites
- 990s
- Annual reports
- Published application guidelines
- Philanthropic press
- Federal government grants
- 30+ other information sources
- Direct reporting from grantmakers

# First identify your needs

Ask three questions:

1. Who are you serving?
2. Where are they?
3. What are you doing for them?




# Project-based search: Find funding

Win more grants and make a bigger difference.  
Find the right funders now.

SAVED SEARCHES

Describe what you are trying to fund: [Advanced Search & Filters](#)

health afterschool program for low income children in Atlanta GA

 Include U.S. Federal Funders [Search by Organization](#) [Search by Person](#)



# Project-based search: Advanced search filters

SHOWING RESULTS FOR "Child welfare, Out-of-school learning, Health, Atlanta (Georgia, United States)" [CLEAR ALL](#) [EDIT](#) [SAVE](#)

Describe what you are trying to fund: [Close Advanced Search & Filters](#)

Subject Area [Match Any](#)

Child welfare Out-of-school learning Health

Geographic Focus

Atlanta (Georgia, United States)

Population Served

Who will be affected. Ex: At-risk youth, Veterans

Organization Name

Name of specific grantmaker or recipient

Location

Location of grantmaker or recipient

Who's Who

Someone serving in organization

Include U.S. Federal Funders [Additional Filters](#)

**SEARCH**

# Search results

SHOWING RESULTS FOR "Child welfare , Out-of-school learning , Health , Atlanta (Georgia, United States) "
✕ CLEAR ALL ⚙ EDIT

**2,783**  
Grantmakers

▼

View Grantmakers Only

**30,171**  
Grants

▼

View Grants Only

**1,023**  
Recipients

▼

View Recipients Only

**1,425**  
990 Tax Forms

▼

View 990 Tax Forms Only

Total Dollar Value of Grants: \$47,933,390,042

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**Grantmakers (2,783)**

		Grantmaker	City	State	Country	Total Assets	Total Giving	Amount Funded	Grant Count
<a href="#">🔗</a>	<a href="#">★</a>	U.S. Department of Health and Human Services	Washington	DC	United States	\$0	\$0	\$11,356,760,768	4,596
<a href="#">🔗</a>	<a href="#">★</a>	Community Foundation for Greater Atlanta	Atlanta	GA	United States	\$961,814,006	\$110,899,151	\$295,339,948	3,552
<a href="#">🔗</a>	<a href="#">★</a>	Fidelity Charitable	Cincinnati	OH	United States	\$21,223,553,156	\$3,764,811,986	\$5,235,637	1,965
<a href="#">🔗</a>	<a href="#">★</a>	The Bank of America Charitable Foundation, Inc., Inc.	Charlotte	NC	United States	\$56,346,261	\$162,446,844	\$2,692,509	603
<a href="#">🔗</a>	<a href="#">★</a>	United States Food And Nutrition Service	Alexandria	VA	United States	\$0	\$0	\$3,174,432,271	276

« 1 2 3 4 5 6 7 8 9 10 » Showing 1-5 of 2,783 Results

VIEW ALL

View All to Print · Export · Email

# Grant count drops quickly

SHOWING GRANTMAKER RESULTS FOR "Out-of-school learning, Health, Atlanta (Georgia, United States)" CLEAR ALL EDIT

<input type="checkbox"/>			Grantmaker	City	State	Country	Total Assets	Total Giving	Amount Funded	Grant Count
<input type="checkbox"/>			U.S. Department of Health and Human Services	Washington	DC	United States	\$0	\$0	\$11,024,895,008	4,734
<input type="checkbox"/>			Community Foundation for Greater Atlanta	Atlanta	GA	United States	\$961,814,006	\$110,899,151	\$288,688,476	3,134
<input type="checkbox"/>			Fidelity Charitable	Cincinnati	OH	United States	\$21,223,553,156	\$3,764,811,986	\$5,114,087	1,901
<input type="checkbox"/>			The Bank of America Charitable Foundation, Inc.	Charlotte	NC	United States	\$56,346,261	\$162,446,844	\$1,903,434	571
<input type="checkbox"/>			United States Food And Nutrition Service	Alexandria	VA	United States	\$0	\$0	\$3,166,308,661	268
<input type="checkbox"/>			Wells Fargo Foundation	Minneapolis	MN	United States	\$33,952,989	\$232,402,740	\$687,233	218
<input type="checkbox"/>			Georgia Power Foundation, Inc.	Atlanta	GA	United States	\$139,901,634	\$9,538,345	\$5,765,156	208
<input type="checkbox"/>			AmazonSmile Foundation	Seattle	WA	United States	\$9,434,696	\$19,865,419	\$78,419	202
<input type="checkbox"/>			The Marcus Foundation, Inc.	Atlanta	GA	United States	\$87,763,039	\$110,381,936	\$110,671,799	193

# Evaluate prospects for strong or weak fit

Ask yourself these five questions as you review each prospect:

1. Do I meet this funder's requirements?
2. Is my mission or project's goal a priority for this funder?
3. How big are the grants?
4. Does this funder support organizations like mine?
5. Do I know anybody associated with this funder?

# Access a funder's profile

SHOWING GRANTMAKER RESULTS FOR "Out-of-school learning, Health , Atlanta (Georgia, United States) "

<input type="checkbox"/>			Grantmaker	City	State	Country	Total Assets
<input type="checkbox"/>			U.S. Department of Health and Human Services	Washington	DC	United States	\$0
<input type="checkbox"/>			<b>Community Foundation for Greater Atlanta</b>	Atlanta	GA	United States	\$961,814,006
<input type="checkbox"/>			Fidelity Charitable	Cincinnati	OH	United States	\$21,223,553,156
<input type="checkbox"/>			The Bank of America Charitable Foundation, Inc.	Charlotte	NC	United States	\$56,346,261
<input type="checkbox"/>			United States Food And Nutrition Service	Alexandria	VA	United States	\$0
<input type="checkbox"/>			Wells Fargo Foundation	Minneapolis	MN	United States	\$33,952,989

# Trend charts

Bill & Melinda Gates Foundation BACK TO TOP ↗

**Bill & Melinda Gates Foundation** ↻  
Seattle, WA, United States | [www.gatesfoundation.org](http://www.gatesfoundation.org) | [in](#) | [Who's Who](#) | [+ Contact Info](#)  
[📌 IS THIS A GOOD PROSPECT? ASSESS THIS GRANTMAKER](#)

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**Bill & Melinda Gates Foundation Most Recent 5 Years At A Glance**  
They've funded 9,280 grants to 3,033 organizations totaling \$23,577,228,033

### What Is Being Funded?

Subject	Giving Amount (Approximate)
Health	\$180B
International relations	\$100B
Education	\$70B
Community and economic development	\$45B
Agriculture, fishing and forestry	\$25B
Human services	\$15B
Science	\$10B
Information and Communications	\$8B
Human rights	\$5B
Public affairs	\$3B

View Each Subject with More Detail

### Where is the Money Going?

View Each State with More Detail

### How Big are the Grants?

Grant Amount	Number of Grants (Approximate)
<\$4,099	2,000
\$5K-\$10K	2,000
\$10K-\$25K	3,000
\$25K-\$50K	3,000
\$50K-\$100K	5,000
\$100K-\$500K	30,000
\$500K-\$1M	15,000
\$1M+	35,000

View Each Grant with More Detail

# Past grants

**Bill & Melinda Gates Foundation**

**GRANTS**

FUNDING INTERESTS

ABOUT

OTHER FUNDERS TO CONSIDER  
Based on similar patterns of giving

APPLICATIONS/RFPs  
and Giving Limitations

FINANCIALS  
for fiscal year 2017, 990s

WHO'S WHO  
Officers, staff, job openings

COMMUNICATIONS  
News, social media, publications

CONTACT

BACK TO TOP ↑

## Grants

MOST COMMON GRANT AMOUNT: \$100,000

SHOWING GRANTS FOR "Program support" ✖ Clear search filters to see all grants

Recipient	Recipient City	Recipient State	Recipient Country	Primary Subject
Medicines for Malaria Venture	Genève		Switzerland	Malaria
PATH	Seattle	Washington	United States	Health care management
New Venture Fund	Washington	District of Columbia	United States	Health
African Development Bank	Abidjan			Development finance
Johns Hopkins University	Baltimore	Maryland	United States	Family planning

# Who's who

**Bill & Melinda Gates Foundation**

GRANTS  
FUNDING INTERESTS  
ABOUT  
OTHER FUNDERS TO CONSIDER  
Based on similar patterns of giving  
APPLICATIONS/RFPS  
and Giving Limitations  
FINANCIALS  
For fiscal year 2017, 990s  
**WHO'S WHO**  
Officers, staff, job openings  
COMMUNICATIONS  
News, social media, publications  
CONTACT

## Who's Who

See who can introduce you to someone at Bill & Melinda Gates Foundation

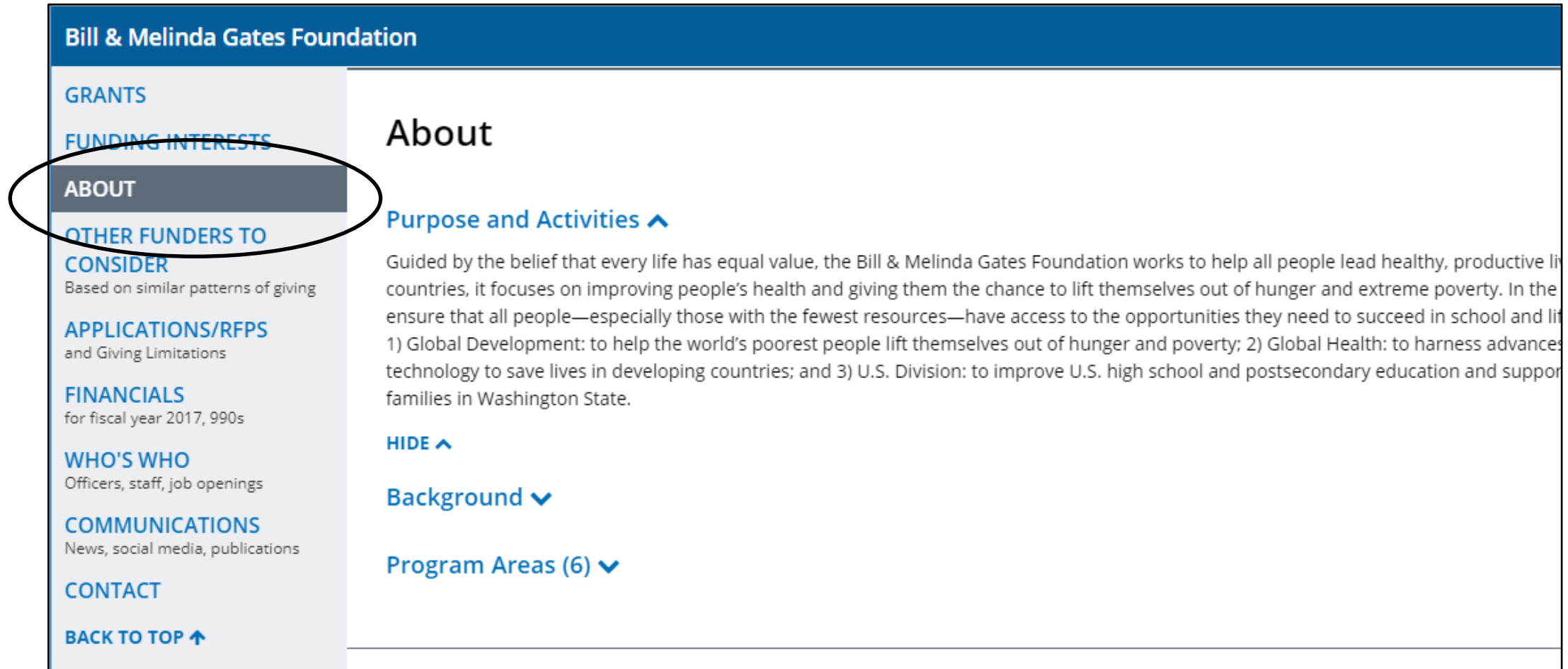
See how you're connected. Click on [in](#) to leverage your professional network and get closer to key decision makers

### Officers and Trustees (16) ^

Melinda French Gates Co-Chair. and Trustee	<a href="#">in</a> William H. "Bill" Gates, III Co-Chair. and Trustee	William H. Gates, Sr. Co-Chair.	Susan D. M.P.H. C.E.O.
<a href="#">in</a> Christopher Elias Pres., Global Devel.	<a href="#">in</a> Allan C. Golston Pres., U.S. Prog.	<a href="#">in</a> Trevor Mundel Pres., Global Health Prog.	Mark Su Pres., Gl



# About the funder



**Bill & Melinda Gates Foundation**

- GRANTS
- FUNDING INTERESTS
- ABOUT**
- OTHER FUNDERS TO CONSIDER  
Based on similar patterns of giving
- APPLICATIONS/RFPS  
and Giving Limitations
- FINANCIALS  
for fiscal year 2017, 990s
- WHO'S WHO  
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- COMMUNICATIONS  
News, social media, publications
- CONTACT
- BACK TO TOP ↑

## About

### Purpose and Activities ^

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people's health and giving them the chance to lift themselves out of hunger and extreme poverty. In the U.S., we ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life.

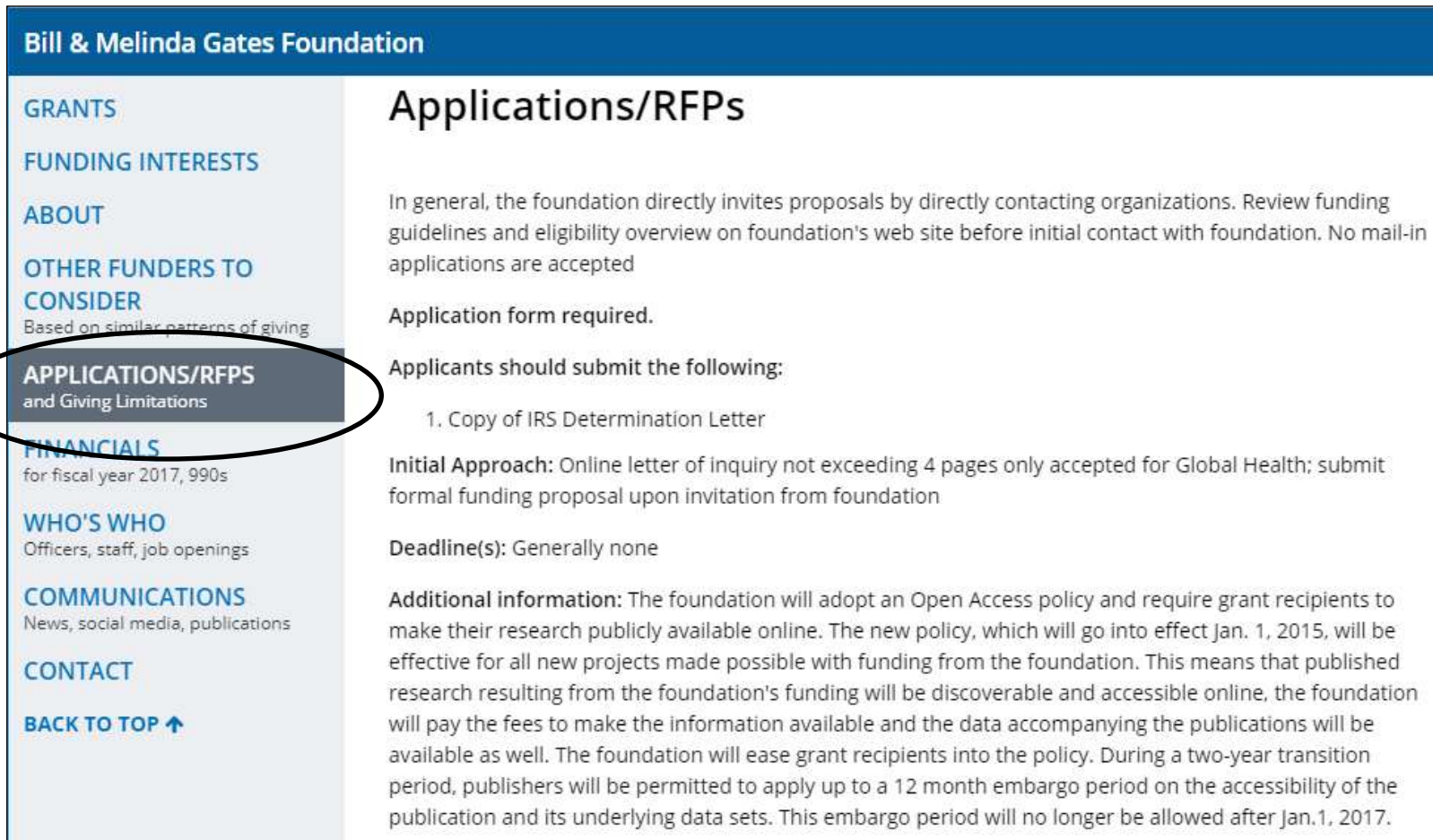
1) Global Development: to help the world's poorest people lift themselves out of hunger and poverty; 2) Global Health: to harness advanced technology to save lives in developing countries; and 3) U.S. Division: to improve U.S. high school and postsecondary education and support families in Washington State.

HIDE ^

### Background v

### Program Areas (6) v

# Applications/RFPs



**Bill & Melinda Gates Foundation**

**GRANTS**

**FUNDING INTERESTS**

**ABOUT**

**OTHER FUNDERS TO CONSIDER**  
Based on similar patterns of giving

**APPLICATIONS/RFPs and Giving Limitations**

**FINANCIALS**  
for fiscal year 2017, 990s

**WHO'S WHO**  
Officers, staff, job openings

**COMMUNICATIONS**  
News, social media, publications

**CONTACT**

**BACK TO TOP ↑**

## Applications/RFPs

In general, the foundation directly invites proposals by directly contacting organizations. Review funding guidelines and eligibility overview on foundation's web site before initial contact with foundation. No mail-in applications are accepted

**Application form required.**

**Applicants should submit the following:**

1. Copy of IRS Determination Letter

**Initial Approach:** Online letter of inquiry not exceeding 4 pages only accepted for Global Health; submit formal funding proposal upon invitation from foundation

**Deadline(s):** Generally none

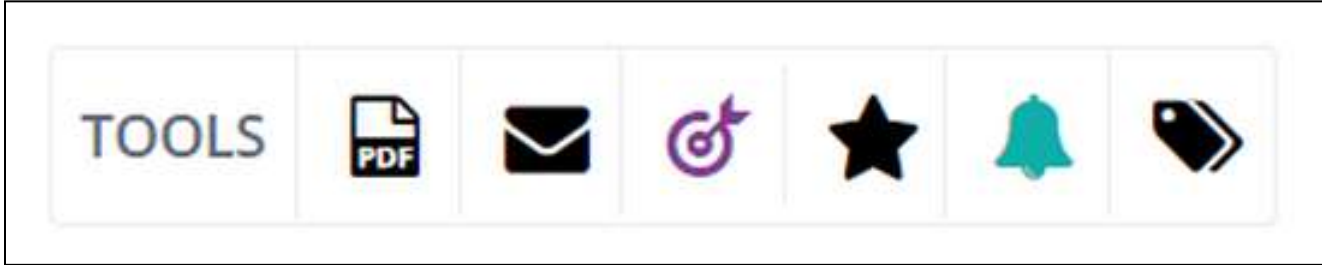
**Additional information:** The foundation will adopt an Open Access policy and require grant recipients to make their research publicly available online. The new policy, which will go into effect Jan. 1, 2015, will be effective for all new projects made possible with funding from the foundation. This means that published research resulting from the foundation's funding will be discoverable and accessible online, the foundation will pay the fees to make the information available and the data accompanying the publications will be available as well. The foundation will ease grant recipients into the policy. During a two-year transition period, publishers will be permitted to apply up to a 12 month embargo period on the accessibility of the publication and its underlying data sets. This embargo period will no longer be allowed after Jan.1, 2017.

# Communications

The image shows a screenshot of the Bill & Melinda Gates Foundation website. The navigation menu on the left includes the following items: GRANTS, FUNDING INTERESTS, ABOUT, OTHER FUNDERS TO CONSIDER (with a sub-link 'Based on similar patterns of giving'), APPLICATIONS/RFPS (with a sub-link 'and Giving Limitations'), FINANCIALS (with a sub-link 'for fiscal year 2017, 990s'), WHO'S WHO (with a sub-link 'Officers, staff, job openings'), COMMUNICATIONS (highlighted with a black oval and a sub-link 'News, social media, publications'), CONTACT, and BACK TO TOP with an upward arrow. The main content area on the right is titled 'Online Communications from Bill & Melinda Gates Foundation' and lists various resources: Flickr, Bill and Melinda Gates and Warren Buffett's Giving Pledge Profile, Knowledge Center, Grantee Perception Report, Grant Database, LinkedIn, Facebook, Grand Challenges in Global Health, E Newsletter, Twitter, Pinterest, YouTube, Impatient Optimists, and Givesmart.

# Save your results

## Grantmaker Profile Tools Box



## View All Grantmakers Tools Box



# Where can you access Foundation Directory?

At Candid Community partners



Find a location near you at [candid.org/find-us](https://candid.org/find-us)

By subscription



Learn more at [fdo.org/](https://fdo.org/)

# Tips for success

## Understand funding patterns:

- On the front page of the directory, scroll down to find overall funding trends in your subject and/or state over time
- Analyze individual foundations' giving patterns over the past ~5 years within their profiles
- You want to identify funders who have a history of steadily giving to organizations like yours!

# Tips for success

## How strong are your search terms?:

- If at first you don't succeed, try, try again. Don't expect perfect search results on the first try!
- Think like Goldilocks. How wide vs narrow a net should you cast? Subject-wise? Geographically?
- Steer clear of the keyword search most of the time
- Take a closer look at our taxonomy

# Tips for success

## Look at your peers:

- Look up organizations that are similar to yourself; who is funding them, and what subject terms are these orgs using?
- Read the descriptions of past grants these orgs have received. Do they have anything in common with you?
- Check their recipient profiles! Try their GuideStar profiles, too!



# Tips for success

## More tricks to try:

- Find the lowest-hanging fruit by eliminating funders who aren't taking unsolicited applications
- Know your giving vehicles; is this a foundation or not?
- Check Philanthropy News Digest for new funding initiatives and RFPs
- As you read a profile, think about how you can leverage this information for relationship-building

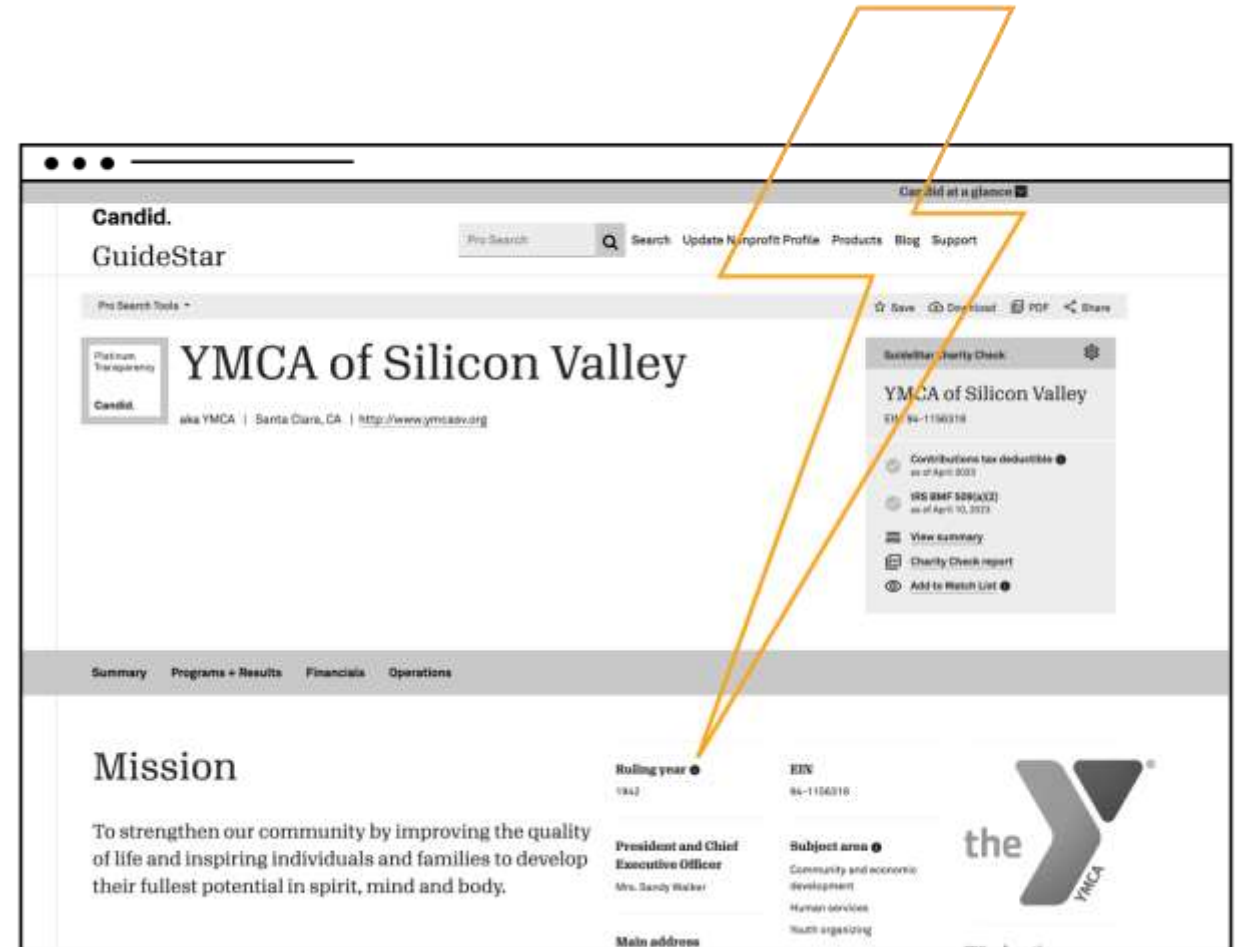
# Funders Research You, Too!

# What's a Candid Profile?

# What's GuideStar?

# Candid Profiles

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



# The Seals of Transparency



**Help donors find you**

Share your mission and keep basic contact information up-to-date



**Guide funding decisions**

Provide program(s) information and brand details



**Gain trust and support**

Provide financial and leadership information



**Highlight your impact**

Share your measures of progress + results

# Transparency Seals matter for fundraising.

Independent research\* has shown that **transparent nonprofits received more contributions** and were stronger organizations.



On average, organizations with a Seal got 53% more in total contributions

- Organizations without a Seal
- Organizations with a Seal

\*Erica E. Harris and Daniel Neely, “Determinants and Consequences of Nonprofit Transparency,” *Journal of Accounting, Auditing & Finance*, 2018. <https://journals.sagepub.com/doi/full/10.1177/0148558X18814134>.

Candid blog summary of the research: [blog.candid.org/post/research-shows-nonprofit-transparency-matters/](https://blog.candid.org/post/research-shows-nonprofit-transparency-matters/)

# Who Uses the Profiles

# Candid data partner network

Tech



Google



PayPal

Donor Advised Funds



FIDELITY Charitable™



Vanguard Charitable



National Philanthropic Trust

Giving Platforms



salesforce.org



Network for Good.

give lively

Just Give .org

Grants Management



FOUNDANT technologies

smartsimple

blackbaud



FLUXX



# Earn Bronze in 5 minutes or less



- Contact information
- Donation information
- Mission and categorization
- Leader name

**Help donors find you**

Share your mission and keep basic contact information up-to-date

 **Tip:** Use [the 2023 Seals of Transparency Guide](#) to identify fields that you need to complete.

# Earn Silver



**Help donors find you**

Share your mission and keep basic contact information up-to-date



**Guide funding decisions**

Provide program(s) information and brand details

# Silver: Share program(s) information

- Display your top 3-5 programs
- For each program:
  - write a short description
  - include geographic area served, population(s) served, and budget

The screenshot shows a website page with the following content:

- Programs and results** (Header)
- Reports and documents** (Links: [Download annual reports](#), [Download other documents](#))
- What we aim to solve** (Section)
  - 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** (Section)
  - 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** (Section)
  - Global
  - World map showing orange highlighted regions.

# Silver: Does your organization make grants? (Yes or No)

Grantmaker Information \*

Does your organization make grants? ⓘ

If your organization makes grants to support other nonprofits, select "Yes".

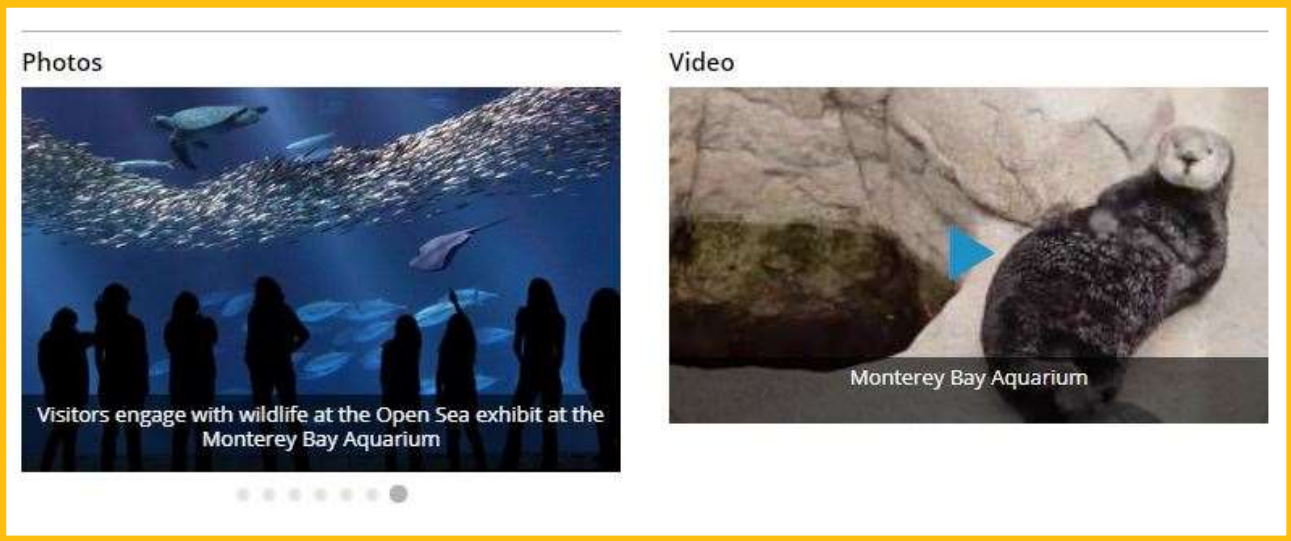
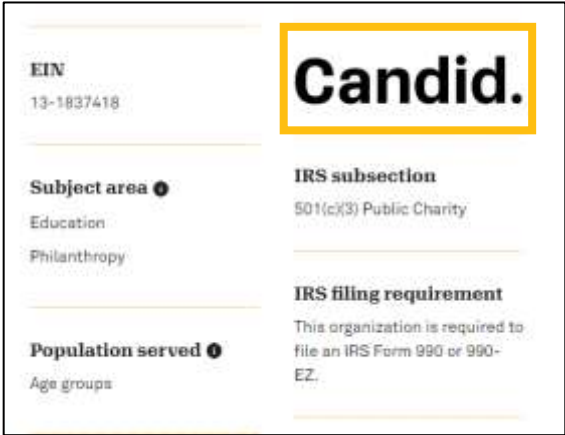
Yes

No

[Clear selection](#)

# 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



# Earn Gold



**Help donors find you**

Share your mission and keep basic contact information up-to-date



**Guide funding decisions**

Provide program(s) information and brand details



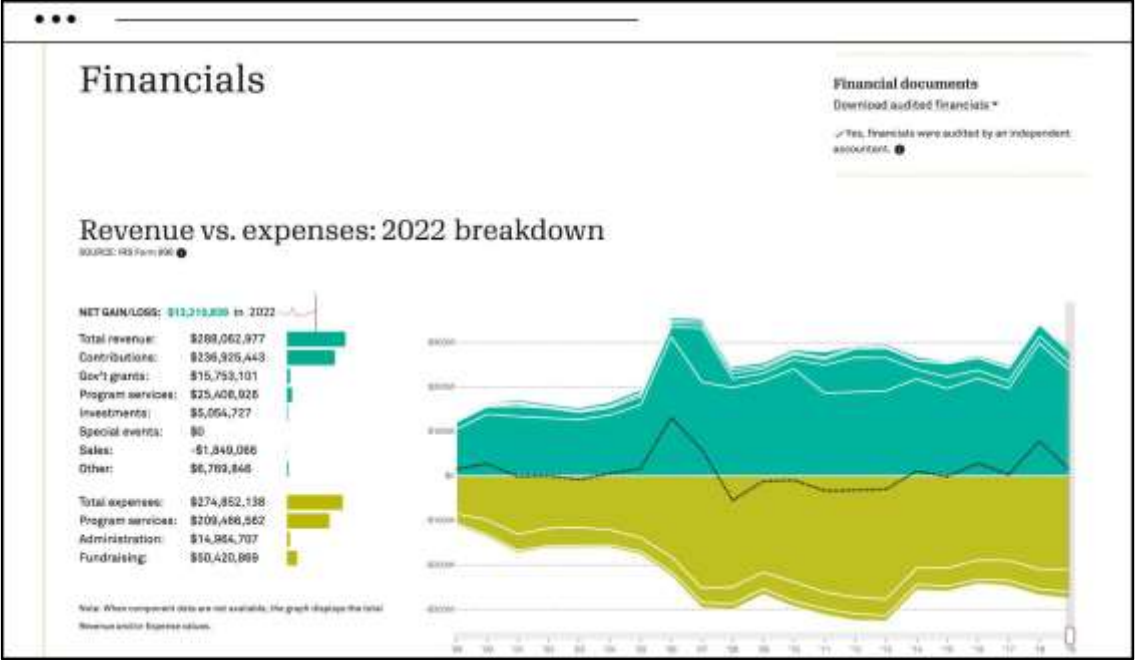
**Gain trust and support**

Provide financial and leadership information

# Gold: Upload or enter financial info

You have two options:

- Upload an audited financial statement (from 2021 or 2022)
- or*
- Complete fields to share financial information



# Collect demographic information to reach for Gold

- Use the How to collect and share demographic data guide
- Specifically:
  - Ask – don't guess
  - Say it's for the public profile
  - Make clear it's voluntary:
    - Decline to state
    - We do not collect

## Candid.

### How to collect and share demographic data

Candid and Demographics via Candid partners invite you to share your organization's demographics through your nonprofit profile. Doing so shows your organization's commitment to equity, can help funders find your organization, and strengthens the sector with insights based on data.

To help you get started, Candid and CHANGE Philanthropy created this guide, including:

- A sample survey--taking the guesswork out of how to ask these questions
- Best practices and definitions

#### Demographic survey best practices

- Don't guess, always ask
- Make all parts of the survey voluntary
- Include a "Decline to state" option for each question
- Treat with sensitivity and confidentiality
- Collect and share on the profile annually



#### Survey administration

##### Participants

To fully complete your Candid profile demographic questions, you should administer the survey to your:

- CEO/Leader
- Senior staff (defined as C-suite or management with budgetary oversight)
- Staff
- Board members

Include information about the people you consider to be your staff--full-time and part-time.

##### Reporting

When you aggregate and report the results, note:

- Information for senior staff should include the CEO
- Information for staff should include CEO and senior staff
- If you do not get a response, you should categorize it as "Unknown"



# Removing barriers to funding resources

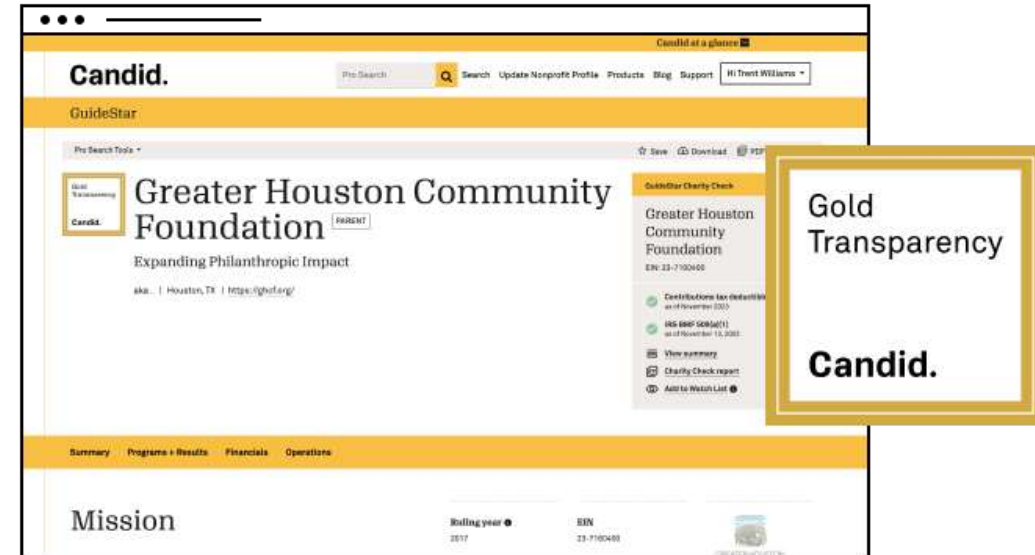
Small nonprofits can access Foundation Directory Essential Annual for free.

## How

- Simply earn a **Gold Seal of Transparency**
- Coupon code will be available in Benefits section

## Who

- Small nonprofits <\$1M in annual revenue or expenses



# Earn Platinum, the highest Seal of Transparency



**Help donors find you**

Share your mission and keep basic contact information up-to-date



**Guide funding decisions**

Provide program(s) information and brand details



**Gain trust and support**

Provide financial and leadership information



**Highlight your impact**

Share your measures of progress + results

# Platinum: Share your strategic plan

Upload your strategic plan\*  
or answer two questions:

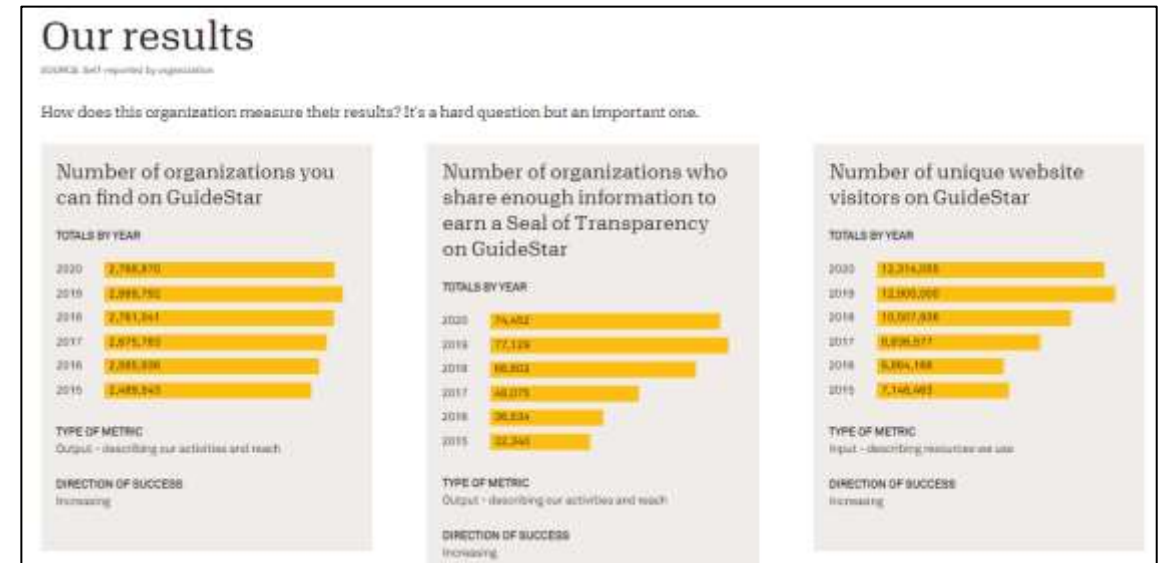
- What is your organization aiming to accomplish?
- What are your strategies for making this happen?

\* Your strategic plan must be no older than 5 years



# Platinum: Share metrics and context

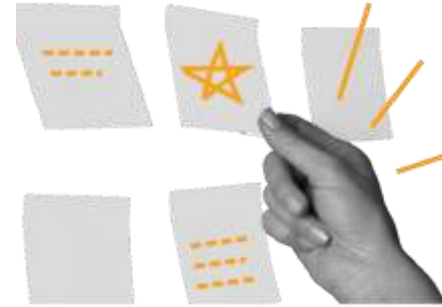
1. Start by displaying your **top 3-5 metrics**. Each metric should have 3-5 years' worth of data.
2. **Include context.** Provide insight for good (or bad) years or explain how your metric specifically relates to your organization.
3. Include a target population and connect to program for each metric (if applicable).



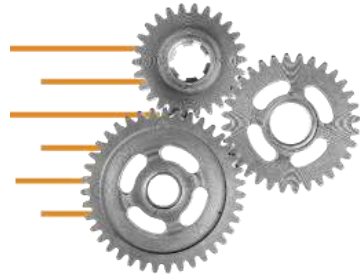
# Use the Common Results Catalog to select metrics



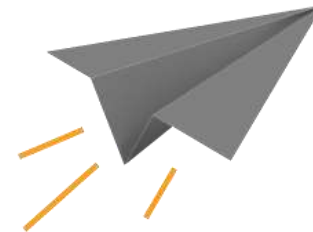
1. Scan the list to help you reflect on your metrics



2. Pick the metrics that best fit your organization or create your own metrics



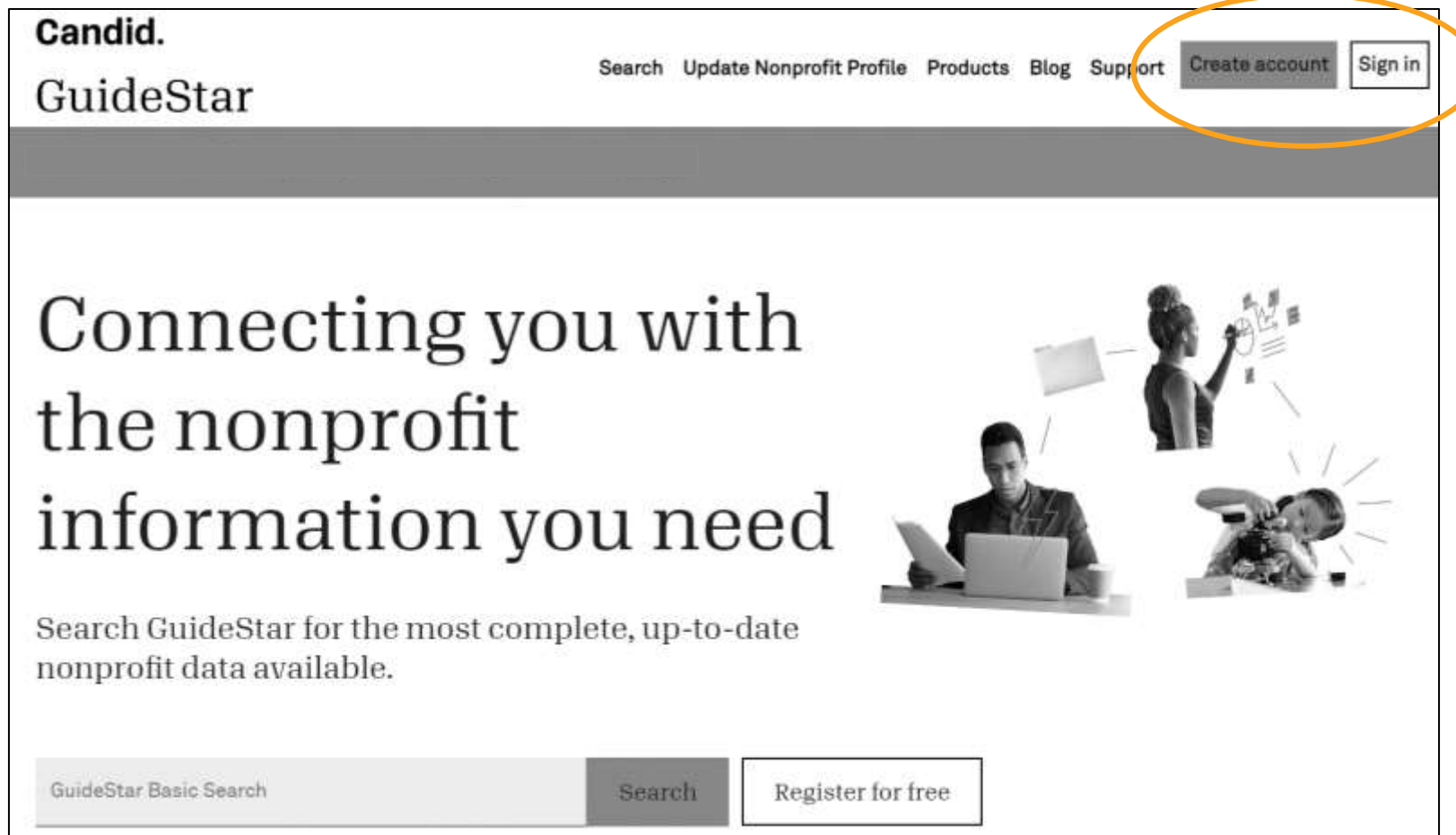
3. Enter your metrics into the Platinum section of your Nonprofit Profile



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

# Claim your Candid Profile

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



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, the main content area features the text 'Connecting you with the nonprofit information you need' and a search bar with a 'Search' button and a 'Register for free' button. The background includes images of people working and a child on a phone.

**Candid.**  
GuideStar

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

Connecting you with  
the nonprofit  
information you need

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

GuideStar Basic Search Search Register for free

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

## Search for your organization

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

- Select location -

## Validate your connection

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.  
\* We do not accept Facebook pages or non-working websites. (You'll have to provide more information.)

Phone

About you

First name \*

Last name \*



**Pro Tip:** Use your work email address when creating your individual account.

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

The screenshot shows the top navigation bar of the Candid GuideStar website. On the left is the logo 'Candid. GuideStar'. In the center is a search bar with 'Pro Search' and a magnifying glass icon, followed by the text 'Search'. To the right of the search bar is the link 'Update Nonprofit Profile', which is circled in orange. Further right are links for 'Products', 'Blog', and 'Support', followed by a dropdown menu icon.

Below the navigation bar, the main heading reads 'Your organizations on GuideStar'. Underneath, it says '2 organizations'. The first organization listed is 'Candid', with a 'Platinum Transparency 2022' badge. Below the organization name is the EIN: 13-1837418. A row of action buttons is displayed below the EIN, with the 'Edit' button circled in orange. Other buttons include 'Assign managers', 'Benefits', and 'Donation Reporting'.

# Resources to help along the way

- Use the [2024 Seals of Transparency Guide](#) to identify information you need to gather.
- Bookmark and reference [help.candid.org/s/](https://help.candid.org/s/) to get answers to your questions, including connecting with our support team

# Questions?

Email me:  
[tracy.kaufman@candid.org](mailto:tracy.kaufman@candid.org)

# Thank you

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