How To Create a GuideStar Profile

That Will Help You Raise More Money

Revised

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Table of Contents

Introduction

About the Candid and GuideStar Names

Candid bought GuideStar and is changing its name from GuideStar to Candid. Both names are listed here as "Candid/GuideStar."

About this eBook

This ebook discusses how I use Candid/GuideStar. It describes the strategies I use as a professional fundraiser for nonprofits.

Candid/GuideStar offers a lot of material on their website to help you complete your profile. I've included links to their materials in this book.

Self-explanatory items, such as filling out your contact information, are not discussed here. Candid/GuideStar evolves every year and it would be difficult to keep up to date.

You do not have to go into the detail that is in this ebook. You can use the guides they provide to complete your profile and get your seal.

This ebook is for people who want to take a strategic approach to building a competitive and effective profile.

It will take a lot of work in your first year. After that, you'll just have to update your information.

This ebook is designed for fast online reading and skimming. It is also designed to accommodate people who have difficulty reading.

About the Example Used in this eBook

I needed to use an example to illustrate a few points throughout this book. I created a fictional summer reading program for children. It is not based on research, nor is it based on any materials I have ever written.

About The Long URLs

The links, the URLs are in their original form so you can see the destination site before you click on it.

Disclaimer

This ebook is presented as information only. It is not endorsed by Candid/GuideStar.

This ebook is not presented as legal or financial advice.

I am not an accountant or an attorney. This is not intended as legal or financial advice. This is about how I use Candid/GuideStar only. I have over 20 years experience in fundraising and grant writing.

Consult with qualified professionals and your Board of Directors.

See what works for your agency.

The images are simple designs I created. They do not represent the actual Candid/GuideStar seals.

Benefits For You

A thorough Candid/GuideStar profile will make it easier for funders to trust you and give you money.

Your agency is already listed on Candid/GuideStar. There won't be any information on it but it's there. Agencies that have a Gold or Platinum seal get twice the views, according to their research.

Many foundations have stopped accepting unsolicited requests for funding. If foundations decide to research new agencies, Candid/GuideStar will be one of the first places they check. This also applies to corporate foundations, philanthropic advisors, and major donors.

You can list up to five programs on your profile. If you are thorough, you will have a much stronger case for support. You will have clearly defined your strategies, achievements, evaluations, and measurement metrics.

If you approach this strategically, you will have created wording that can be used for grants, Letters of Inquiries, also known as Letters of Intent (LOIs), newsletters, annual reports, etc.

You can upload your annual reports, newsletters, strategic plans, and awards. You can add photos and links to videos for a greater impact.

You can link to your social media accounts. You can include a LinkedIn profile for your agency's leader and Board chair.

This will give potential funders a well-rounded impression of your agency, your leaders, and the work you do.

This process will inspire you to start documenting the work that you do.

You can download a seal for the highest level you have earned, (Bronze, Silver, Gold, or Platinum). You can use it on your website and on your marketing materials. It will show your commitment to transparency.

You can unlock the funds you may have in Amazon Smile, Facebook, PayPal, club card rewards, and a few other online giving sites.

You won't earn much from these but they're another way to keep in touch with your donors. All you have to do is fill in the Bronze level questions and answer two additional questions.

You can add a "Donate Now" button to your Candid/GuideStar profile and your nonprofit's Facebook page.

You can save all the wording in your agency's cloud storage. This way everyone who needs to use it can access it for consistency.

You may find that you're doing a lot more "fundable" programs and services than you're aware of.

I've worked with agency leaders who were surprised to learn how many "program services" they were providing. They thought most of their work fell under "general operating expenses."

As a result, they didn't go after a lot of grants that they qualified for.

Benefits for Funders

They can research your agency on Candid/GuideStar in private.

Candid/GuideStar's "Charity Check" is a paid subscription service that funders can subscribe to. It ensures compliance on "all five IRS requirements."

Funders can conduct most of their due diligence on Candid/GuideStar and upload reports from Candid/Guidestar's website. They can save paper and simplify the research and verification process.

Funders can view tax returns that come directly from the IRS so they can trust the information. They can also download them if they need to.

You should still post your tax return on Candid/GuideStar. It will take a long time for the IRS to delete the Schedule B from your tax return. Then they have to distribute the tax returns to websites like Candid/GuideStar.

Foundation staff can download all the other materials that you provide on Candid/GuideStar.

No other website offers the amount of information about nonprofits that Candid/GuideStar does.

There are many ways that funders conduct due diligence. For example, they will probably check Charity Navigator.

Charity Navigator is a nonprofit that rates charities. They get some of their information from Candid/GuideStar. They focus on agencies that earn over $500,000 a year in donations. They provide a "guide for giving" for donors.

Funders will also look at your website and ask other local funders about your agency. But Candid/GuideStar will be at the top of their list of places to check.

If you anticipate raising close to $500,000 a year, be sure to complete the Platinum section on Candid/GuideStar so that Charity Navigator can use it.

Charity Navigator's home page:

https://www.charitynavigator.org/

Before You Begin

First you will have to “claim your Candid/GuideStar profile.”

Claiming Your Profile is Easy

- Create a login email address and password
- Search for your agency
- Click the "Claim your Candid/GuideStar profile" button. Answer a few short questions so they can verify that you are authorized to access the profile.

It will take a few days for them to verify your information and give you access to your account. They will send you an email notification as soon as you can access your page.

Candid/GuideStar Has Four Levels of Transparency

- Bronze
- Silver
- Gold
- Platinum

You can view or download the "Candid Seals of Transparency Guide" for all four levels at:

https://guidestar.candid.org/update-nonprofit-profile/?_gl=1*hqmqtx*_ga*MTQ5NTE5MzU3MC4xNjUyODIxMjg4*_

It is faster to Google the title.

You can also look at other nonprofit profiles to see how they're answering the questions.

You don't have to do this all in one day! You can take one step at a time. You don't have to wait until you finish a section to publish your updates. You can publish your changes as you add new material.

Or, you can choose to save your work without publishing it. This is a great option if you need to get approval or if you don't want to publish an incomplete section.

Each level has both required fields and optional fields of information.

You must earn each level in order. For example, you can't skip the Silver section and go from Bronze to Gold.

Once you qualify for any of the four levels, you can download a "seal of transparency" for the seal you earned. Candid/GuideStar gives you logos in several different formats that you can use for print and online. Seals are valid for one year.

Create a cloud storage folder to store the material that you create for anyone who needs access. This will help you make sure that all your information matches on all your materials.

Be sure that all your information matches...your

- Needs statement
- Number served
- Programs
- Goals
- Strategies (methods and objectives)
- Evaluation methods
- Accomplishments, Results

On all your materials, everywhere, on your

- Website
- Tax return
- Grant proposals
- Newsletters
- Appeal letters
- Candid/GuideStar
- Annual reports

About Cloud Storage

Google gives Gmail users 15 GB of free cloud storage on Google Drive. You can share files and folders with people on Google Drive. iCloud (Apple) and OneDrive (Microsoft) give users 5 GB of free cloud storage.

A Few Links From Candid/GuideStar To Help You Get Started

Help Center:

https://help.guidestar.org/en/?_gl=1*186ypsn*_ga*MTIyMjk2ODM1LjE2NTQ3NTA2NjA.*_

How to update your nonprofit profile:

https://help.guidestar.org/en/collections/1020381-how-to-update-your-nonprofit-profile

A video about how to update your profile:

https://www.youtube.com/watch?v=2ZEk0_y7dC8

Writing Tips

People read differently online than they read print. They skim and scroll when they read online.

This means that you should format your text to make it easy to skim through. Use headers and short sentences.

One-sentence paragraphs are OK.

Avoid long sentences and paragraphs.

It takes more work to understand long sentences and to read long paragraphs. People often need to stop and reread long sentences. It gets overwhelming so they give up.

Each paragraph should make one point. Let readers digest that one point. Give them a break in the white space between paragraphs before you make your next point.

The first sentence of a paragraph is the most important. Then add any backup material you need to support your first sentence. People may just read the first sentence and skim past the rest of the paragraph.

Front load your most important information. This means put the most important information in front because people may not read through to the end.

You will have plenty of space to write. You'll be able to use up to 3,000 characters in most places. Try not to use them all.

Be as brief as you can while packing in as much information as you can.

You can use the free versions of online writing editors to make your writing more readable. Two of the most popular are Grammarly and Hemingway Editor.

Grammarly

https://www.grammarly.com/

Hemingway Editor (what I used for this book)

https://hemingwayapp.com/

Write with love.

In the nonprofit world, write with love.

Earn the Bronze Seal

The Bronze Seal is about contact information, your mission statement, and your agency leader’s bio.

Overview

Getting to the Bronze level is easy! It's about your contact information. I recommend filling out as much of the optional information as possible.

Give funders as much information as possible so they can get to know your agency.

For example, Candid/GuideStar will ask you to choose one to five subject areas that your organization works with. Use all five if applicable.

They also ask you to choose one to five characteristics of your target population. You can also add other keywords that fit your organization.

There are only two fields in the Bronze level that require a written answer:

1. Your mission statement. Use your formal mission statement for consistency
2. A short bio of your agency's leader

How to Write or Edit a Bio For Your Agency's Leader

If they already have a bio, start with that. Take a look at other written materials about them. Write a summary and see if their "why" is clear and stands out.

Their "why" is why they do what they do. Why this cause, why this agency. What keeps them up at night. Why they're excited about the progress they're making.

Leaders describe their "why" and their accomplishments during VIP or foundation site visits. If possible, listen to what they say and use it in your bio and fundraising materials.

Keep in mind that the following hints for creating a bio are specifically for Candid/GuideStar. You'll want to include a few more things in your leader's bio on your agency's website.

Write in the third person. You can try something like this:

First sentence: introduce them, something like this:

> Jane/John Doe (MD, Ph.D., MS, MA, LCSW, etc), is on a mission to (help/change/teach/create, etc...)...through X.
>
> Or, Jane/John Doe's commitment to (help/change/teach/create, etc...) has impacted X number of X...by... X.

Second sentence: their position and a major accomplishment, something like this:

> As the Executive Director of X Agency, he/she...

Third sentence: their qualifications, something like this:

> Doe received awards from X for X, from X for X, and from X for X. He/She graduated from X University.

Fourth sentence: a values statement, something like this:

> Her/His vision is to...or,

> As a lifelong advocate for X, he/she embraces the values of...or looks forward to a world where X...etc.

Fifth sentence: an optional statement to make them sound more human. Something personal, like this:

> When Doe isn’t at X Agency, he/she creates/is/explores/relaxes at/is a dog mom (but don’t name the pet; people use pet names for passwords), etc...

Other Tips For Writing Bios

Once you have a rough draft, give it to the person and ask them to edit it. People are usually happy to edit something that is already written. That’s when the good stuff comes out so encourage it!

Avoid writing a list of accomplishments but add one or two for impact.

Let them know if you need a shorter bio. Tell them you’ll use a longer version on the website or other social media account.

Unlock Your Rewards

This is about unlocking your AmazonSmile, Facebook, PayPal, store club cards, etc.

Overview

This information will unlock your AmazonSmile account (if you have one), store club card funds (such as Kroger's and Ralph's), and PayPal. Facebook and other social media sites also rely on Candid/GuideStar to verify your nonprofit status.

Whenever possible, Candid/GuideStar will auto-fill information from the Bronze section. You will only have to add a few more things.

Required

- Total revenue for the previous year
- Choose from the 17 "Sustainable Goals" that your agency addresses. The United Nations adopted these goals to use until 2030.

A link to the U.N.'s Sustainable Goals website:

https://sdgs.un.org/goals

AmazonSmile's About page:

https://smile.amazon.com/charity/smile/about

Facebook Donations Fund:

https://www.facebook.com/help/176316859869634

Ralph's Community Contribution Program:

https://www.ralphs.com/i/community/community-contribution-program

Earn the Silver Seal

The Silver level focuses on programs and branding.

Programs Overview

You only need to describe one program to qualify for the Silver seal.

You can list up to five. List as many programs as you can because it will give funders a better understanding of your agency.

There are several benefits to listing your top five programs:

- Funders can get a comprehensive understanding of the programs your agency offers.

- If you're submitting a letter of inquiry/intent (LOI), you won't have the space to be thorough. Candid/GuideStar gives you enough space to go into detail.

You will have written the basic information and wording to use for other grant proposals and LOIs.

You have a choice of how much information to post. Be as brief as possible but also be thorough.

Use the programs and statistics from your last fiscal year.

If you do not have well-written program descriptions, now is the time to write them.

Ask your program staff specific questions about the programs they work on. Interview them one-on-one if possible because you'll get more information that way.

You can bring the staff together later to edit the wording.

Write the program descriptions the same way you would write them for a grant. Let your program staff do the editing.

In my experience, a lot of small nonprofits do not realize how much work they do.

They don't realize how much they accomplish.

Sometimes the staff thinks they're only doing work that falls under general operating expenses. You can help them identify the services they're providing if you ask the right questions.

Ask each person what they do during the day. Ask a lot of questions.

Using the example of a summer reading program for children, I'd ask:

- Do you ever refer the parents to other agencies for services that you cannot provide? (Referral Services)
- Do you set learning goals with the children and their parents? (Individual Program Planning or Individual Learning Path Plans)
- What is the one thing that people would be the most surprised about the work that you do? (Achievements)
- What is the most challenging aspect of your job? (Evaluations, Methods, Feedback Practices)

If at all possible, record your interviews.

Get decent video. Make sure the area is well-lit and that the sound is good. Ask your staff for permission to use some of the video clips on social media. You could also create longer form videos from the interviews.

If you want to list a new program, make clear that it's new so funders won't expect to see accomplishments.

Briefly describe your programs using the standard grant proposal components:

- Target Population
- Needs Statement
- Agency Qualifications
- Goals, Methods/Objectives
- Timeline
- Evaluation
- Outcomes/Accomplishments

Target Population

Describe the people or cause you serve in a dignified way.

This uses the example of a summer reading program for children. It is not based on fact, except for the two sources cited.

Avoid clichés like "at-risk youth."

Use clear descriptors instead.

Consider this statement:

"Gangs have claimed every single inch of this neighborhood. Every. Single. Inch."

(This is true for several areas in Los Angeles.)

Compare it with the term "at-risk youth."

Use specific terms like:

"Youth, ages seven and eight, who live in neighborhoods where 70% of people live below the federal poverty line. In these areas, every single inch of territory is claimed by rival gangs. And clearly marked. Every single inch. "

Numbers and statistics tell a story. It helps people form a picture in their mind.

It also shows that you know your target population and the community.

It is beyond the scope of this book to go into detail about searching for statistics, but here is an abbreviated explanation:

You can search by zip code on the U.S. Census Bureau website. Most neighborhoods will have more than one zip code so you'll have to add and average your statistics.

Search by zip code here:

https://data.census.gov/cedsci/

Cities, counties, and states will have also demographic information. School districts will have demographic information.

In Los Angeles, our public schools teach children who speak 94 different languages, not including English.

When I researched this, I found that this number varies widely.

The number goes from "94 languages" to "220 languages and dialects."

The phrase "and dialects" makes it a much bigger number. It also helps make the point that each language can have many dialects.

But you shouldn't use the 220 number if it's just for dramatic effect.

When you face this type of discrepancy, go to the original source (the school district). Use their numbers, you'll sound more authentic and trustworthy.

Cite your sources to create a more compelling and believable narrative. To "cite a source" is to mention the source of the information you are using. It means that you tell people where they can view the original document.

You can use asterisks (*) or numbers to show your sources at the end of your text. For readability, it's better to have your sources at the end rather than to put them in the middle of your text.

Several large urban areas created "Service Planning Areas" (SPAs). SPAs help in urban planning. SPAs help nonprofits and government agencies identify needs according to socio-economic needs. They help agencies provide the delivery of social and health services.

Some large foundations in L.A. will ask which SPAs you serve. (There are eight SPAs in L.A. County.)

Check to see if your area has anything similar.

Needs Statement

Your Needs Statement is at the heart of what you do. This is where you connect with your readers so make it count!

Front-load your Needs Statement with your most compelling points. People might not read to the end so put the best stuff first.

Continuing with the "summer reading program" example, you could write something like:

> "'School-based risk factors such as poor school performance and poor school attachment are primary factors for eventual gang involvement.'*
>
> When children fall behind in school, they also fall behind in life. They will feel shame, humiliation, and hopelessness.
>
> There is also a sense of "being on the outside looking in" when you can't read but your classmates can. Another challenge is that '94 languages other than English are spoken in Los Angeles schools.'**
>
> They may come to believe that there is something deeply wrong with them.
>
> These young students are going to feel alienated from their teachers and from school. They will feel despair and self-loathing before they are eight years old.
>
> It is not much of a stretch, then, for young children to believe that their only chance in life is to join a gang.
>
> Romanticizing gang life starts in elementary school.
>
> Young children watch movies, play games, and listen to music that glorify gang life.
>
> Their parents or other family members may belong to a gang.
>
> Gangs offer a sense of acceptance and belonging that they may not find at home or at school. Gangs also offer a sense of adventure and pride."

* Howell and Egley 2005; Kosterman et al., 2005, published in "School and School Data" by the National Gang Center OIP.

** Los Angeles Unified School District's (LAUSD) Office of Communications. Source: Superintendent's Final Budget 2017-18.

Don't go overboard with your Needs Statement but don't be afraid to state the problem in clear terms.

Don't add a lot of fluff or use dramatic, flowery language. Be as clear as possible. But be sure to mention the stakes. What's at stake for the individual, the family, the school, and the community.

Tug at your readers' heartstrings a bit without being dramatic or "fluffy."

Agency Qualifications

You can list awards and commendations for providing exemplary services, such as:

- "X" award for "X"
- "Y" award for "Y"
- "Z" award for "Z"

You can list other agency qualifications that show you know how to achieve your goals, such as:

> "87% of students who complete our summer reading programs learn how to read at their grade level."

Goals

Use the SMART Goals format:

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound

For example:

> "Our summer intensive reading program will teach 25 children to learn to read. These children are graduating the second grade without being able to read at that level.
>
> They are not ready for third grade coursework. We will teach them how to read and prepare them for the third grade.
>
> It is imperative that we reach children who are falling behind at this age. If we can't reach them now, we never will. They are starting to feel alienated from the school and their teachers at this age. But there's still time to intervene.
>
> At the end of the summer program, these children will have an increased sense of self-esteem. They will have a connection with their teachers.
>
> Our curriculum is designed to be fun. We celebrate accomplishments while helping students increase their communication and social skills.

We recruit VIPs to visit. This helps the children feel more connected to their school and their community. It shows them they're wanted and valuable.

Our instructors have had success helping over 500 students catch up on their reading skills using the methods described below."

How the goals listed above relate to SMART goals:

- 25 children - Specific, Measurable
- Second grade reading skills - Specific, Measurable, Achievable, Relevant
- Summer intensive - Timebound
- Increased self-esteem - Measurable, Achievable
- Increased connection with teachers - Measurable
- Effective methods - Measurable, Achievable
- Instructor's prior success with this program - Measurable, Achievable, Relevant

Methods and Objectives

A goal is your destination. Methods and objectives are the specific and measurable actions you need to take to get there. The main difference between methods and objectives is that objectives can be measured.

In keeping with the example above, here are a few methods and objectives:

- Method: We will use the standard "Lexile" testing model to test all students in the second grade.
- Method: We will conduct the tests during the first week of May. This will give us time to process the tests and offer the program to the students who have the lowest scores.
- Objective: We will offer the program to 25 students with the lowest scores.
- Objective: We will choose five students as alternates. If any of the 25 students are not able to participate, we will offer the class to the alternates.
- Method: We will contact the parents by May 15 by phone. We will give a brief description of the program and ask if they want their child to participate.
- Method: Parental involvement is essential. We will partner with them in the following ways:
  - Method: Meet with parents and the student and discuss the program in detail.
  - Method: We will create a calendar of all classes and activities. Parents are required to sign a statement saying that they've received and approved it.
  - Method: We require the children to attend all classes and activities. It is an intensive program. Each day is a crucial step toward learning how to read. Parents are required to sign a commitment.
  - Method: We will ask the parents to sign a video/ photo release. It will be used only when we have VIPs or celebrities involved with our activities.

- Objective: We will conduct progress tests every two weeks to make sure the children are learning at the expected rate.
- Method: Those who fall behind will be given homework so they can catch up to the class.

Timeline

You don’t have to go into the type of detail on Candid/GuideStar like you would a grant proposal. Be sure to give readers a good idea of your timeline.

Keeping with the Summer Reading Intensive example, state something like:

- Six continuous weeks of classes that focus on reading skills
- Progress tests every Friday
- Classes run Monday - Friday
- Standard school hours: 9:00 am - 2:00 pm
- Classes start the week after July 4th
- Final outcomes assessment on the last day
- Reports to parents and schools within 5 business days of the final outcomes assessment

Evaluation

There are many ways to test educational goals. Briefly discuss the ones you are using.

You’ll get more into the accomplishments in the Platinum section. From a strategic perspective, talk about your evaluation process here in case they do not read through to the end.

If you hire an outside evaluator, be sure to mention it and use their name. You’ll be able to upload their reports in the “Additional Documents” section.

If you do not have a formal evaluation process, describe what you use. You have meetings where you discuss outcomes and goals. Use those.

Outcomes / Accomplishments

You only need enough accomplishments for a paragraph or two in the Silver category.

You will do a deep dive into accomplishments and metrics in Platinum category. There is a “Quantitative Metrics” section in the Platinum section. It will help you uncover your accomplishments.

Refer to your list of methods and objectives. They will reveal your target outcomes and accomplishments.

It can be hard to get numbers and accomplishments from staff. They can take offense no matter how you ask. Frame your questions in a non-threatening way.

Ask them what they are most proud of. They may surprise you with a few great accomplishments.

If your agency does not track service and program statistics, you may have to create a way to track them.

You'll need this information for grant reports, donor reports, annual reports, newsletters, and fundraising appeals.

Using our example, a sample of the outcomes and accomplishments would be:

- 30 children given Lexile reading tests during the first week of May
- Six children had developmental delays or dyslexia
- We referred them to more appropriate programs that will support their learning
- 25 children participated in the summer intensive reading program
- 21 children showed improvement in the first week
- We gave three children extra counseling to determine if they are living in abusive homes
- 18 children met the expected reading level at the end of the second week
- Six children showed improvement but not at the level we expected
- At the end of the summer intensive reading program, 18 children were ready for the third grade
- Six children had improved reading levels but are not ready for third grade reading
- All children exhibited increased confidence and connection with the teachers

When you state that some people fell behind in your program, you should include a plan to help them catch up.

In the example above, six children did not advance as far as expected. They will need more help to catch up and succeed in the third grade.

Will your agency be able to help them? Can you give the school a plan of action for each student that didn't reach the third grade reading level?

Keep in mind that you can use your accomplishments in:

- Social media posts
- Newsletters
- Email campaigns
- Year-end appeals
- Board reports
- Tax returns
- Website
- Annual reports

Branding

Three fields are required and two are optional. If you do not have a logo, tagline, or social media account you have to state that you don't have them.

Required Fields:

- Logo
- Tagline
- Social Media accounts

Optional Fields:

- Photos
- Videos

Logo

Upload a high quality version of your logo, preferably a SVG file. SVG stands for "Scalable Vector Graphics." You can enlarge SVG files without losing quality.

If you have a SVG file, the file extension will be .svg. For example "photo.svg."

Candid/GuideStar states that Google, AmazonSmile, and PayPal prefer to work with SVG files.

But most people work with JPEGs, which are squeezed (compressed) files. They become pixelated or fuzzy when enlarged. PNG files are a higher quality but can also get pixelated when enlarged.

If you hired a professional to create your logo, you should have a .SVG file in the logo package. Printers use .SVG and .EPS files so most professionals include them.

If you don't have a .SVG, use a .PNG or .JPEG file, in that order. PNG files are a higher quality than JPEG.

It's easy to convert a .PNG or .JPEG file to a .SVG in Photoshop. See if you know someone who could do that for you.

Tagline

A tagline is a short, catchy phrase like Nike's "Just Do It" or Apple's "Think Differently."

A lot of nonprofits don't have a tagline. If you don't, you could have a brain-storming session or online contest to make one.

What words come to mind when they think of your agency? Write them all down.

Can you arrange a few of those words in a powerful way? Is this something your Board would enjoy deciding?

Social Media Accounts

Take a "social media audit." Determine if anything on your social media accounts is extreme, mocking, hateful, or offensive. If it is, delete it.

Nonprofit staff are passionate people. We should still refrain from posting extreme political opinions or hate.

People who are working on a solution don't post things that are too negative or painful. They don't want people to lose hope.

Leaders want people to get into the solution.

Post action steps and solutions. Show your passion and commitment to building an equitable society without bleeding out online.

Only add the social media accounts that you update regularly.

Photos and Videos

Upload only the best photos that show your programs in action. Make sure they show your clients in a dignified way.

Make sure you have photo and video releases for everyone in your photos and videos.

Shocking or horrific pictures will not persuade people to donate.

I call it the "bloody stump rule."

Bloody stump pictures show blood and gore. They shock and repel. They overwhelm.

People do not donate unless they feel they can make an impact. Your words offer a solution. Your visual media should match your words.

"Programs in action" pictures, "recovery in progress" pictures, or "accomplishment" pictures are compelling. These types of pictures give people hope.

Show your special moments, your "firsts." The moment someone walks out of the hospital, the moment someone graduates. Show the special moments that bring us so much joy and make it all worthwhile.

A full set of lessons about how to get the best pictures and videos is beyond the scope of this book. I will be cover it in another publication, but here are a few tips.

Tips for Photos and Videos

Use good lighting. Make sure there is enough light on people, especially those with darker skin tones.

Make sure your photos are in focus. The eyes are the most important thing to have in focus.

Imagine a Tic-Tac-Toe over the frame - frame your photo so the eyes are close to the top line.

Only show a few people at a time in your photos. Having too many people in a picture makes it hard for viewers to connect with them.

Try to put your main subject a bit off-center.

Show the dignity and humanity of the people you are providing services to.

Use simple backgrounds. Only show what you want people to see. Busy backgrounds are confusing and distracting.

Video Tips

Stories are the most compelling types of videos.

Tell one story at a time. Otherwise, it gets too complicated to hold your viewer's attention.

Some types of stories you can tell are:

- Your agency's origin story
- Your leader's and Board's "why" stories
- Your leader's and Board's vision stories
- Your leader's and Board's values stories
- Donors as Heroes stories - your donor's journeys
- Success stories

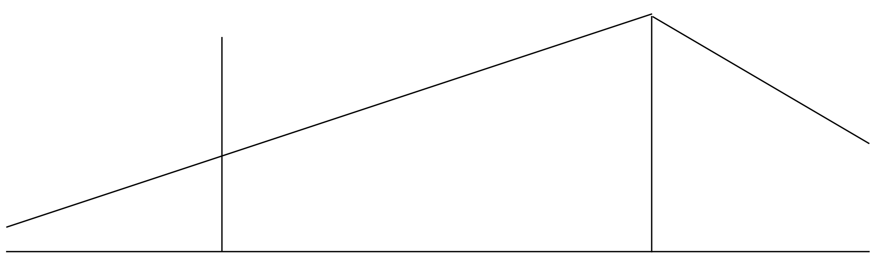
- The “why” of your programs and services
- Testimonial stories

Most stories follow the format of:

- Beginning - 25%
- Middle - 50%
- End - 25%

Think of how you can present your material in a basic story format: with a beginning, a middle, and an end.

Create a story arc that looks like this:



Beginning 25% Middle 50% End 25%

Beginning

Highlight an obstacle or challenge. An unmet need. An unresolved problem. Using the example of a summer reading program, here are some story ideas for videos.

Please remember that this is a fictional example. You could interview one of your teachers for this. Have them describe the problems a typical child who falls behind would have. What is their life like?

A typical child may be confused before they realize they are falling behind. Perhaps their parents feel it is a disciplinary problem. Are they being punished?

Parents may withhold approval and affection over falling grades. How is that child feeling around the middle of the school year?

Are they starting to feel hopeless, alienated, alone? Is self doubt and self loathing starting to creep into their consciousness? Is their behavior starting to change? Are they being bullied or taunted at school?

Have your interviewee describe the human cost of the problem or unmet need. Help your viewers understand what’s at stake if no one takes immediate and effective action.

This is the beginning of the story, the problem. It is the needs statement.

Middle

In this example, the middle of the story starts with the methods the parents and the school are using to help the child.

They may not be using any methods at all. Parents and schools are overwhelmed and may not be able to respond effectively.

The second half of the middle is the summer reading program and the methods they use to teach. The milestones along the way. The child turning things around and starting to feel pride and a sense of connection.

For you and your agency, the middle is how you face your challenges. Your milestones, your important moments.

How you are working to meet the unmet need or solve the unresolved problem. How you use your methods to achieve success.

End

In the summer reading example, your story could end by showing happy children reading. This shows what changed and what is diferent as a result of the program.

Have your interviewee show the joy of success, what success looks like.

Has the unmet need been met? Is the unresolved problem resolved? Is there a happy ending, and if not, have you identified your next steps?

You want to show what changed as a result of your actions. What is different as a result of your achievements?

Other Video Tips

Keep your programs and services videos under two and a half minutes. Less than a minute is ideal. Link your videos from YouTube or wherever you host them.

You can improve your SEO (Search Engine Optimization) when you host videos on YouTube because Google owns YouTube. Unfortunately, they'll show ads, but they do provide auto-generated captions.

Captions

YouTube will make auto-generated closed captions, which is a great feature. Because they're auto-generated, they're not completely accurate, but they're close enough.

It's best if you can create your own captions, but that can be difficult.

There are two types of captions:

- Closed, where viewers can choose whether or not to see them on, or
- Open, where captions are "burned" into the video

Options for captions change and evolve often. You will have to see if your video editing program offers a way to create your own captions.

Earn the Gold Seal

The Gold level focuses on financials and leadership demographics.

Financials

You have two choices. You can either:

1) upload your most recent audited financial statement or

2) fill out the information requested

Option 1

They ask for a recent audited financial statement. You can use one from your last fiscal year or the previous year.

Option 2

If you don't have an audited financial statement, you can use the financial information from your most recent IRS Form 990.

Optional Fields

There are optional fields you can fill out in this section. Fill out as much as you can, even if the information was already given in a previous category. This can all be uploaded into a report so fill out everything you can.

Leadership Demographics

You can add your Board and their affiliations in this section. Affiliations means the companies they work for or the companies they represent. Ask them for permission before you make it public.

Candid/GuideStar asks for a lot of personal information in this section. They will also ask about this for your staff in the "Optional" section after the Platinum section. You have the option to choose "Decline to State" on the required questions.

DEI stands for Diversity, Equity, and Inclusion. Diversity adds to the effectiveness of programs and services you provide. It is critical to the long-term health of your organization.

In some areas, disclosing too much personal information can backfire. It can lead to violence. It could also lead to a loss of donors, income, and authority in your field.

I recommend you do not answer questions about sexual orientation or gender identity. Choose "Decline to State." Unless you are working in that field, keep it private.

You can support the LGBTQ community in other ways. You can stand for equality as an agency. You can create solidarity posts on social media without disclosing your Board and staff's personal information.

The Four DEI Questions

- Race and Ethnicity or Decline to State
- Gender Identity or Decline to State
- Sexual Orientation or Decline to State
- Disability Status or Decline to State

Race and ethnicity are safe to discuss. You'll want to have those statistics and make them public.

People who have disabilities may not want to disclose anything about their condition. Ask them before you post anything.

Candid/GuideStar offers a questionnaire and guide to help you create a more diverse and equitable organization.

DEI Survey and Equity Strategies Checklist, PDF download:

https://cdn.candid.org/pdf/candid-dei-data.pdf

Earn the Platinum Seal

The Platinum level focuses on strategic planning, quantitative metrics (progress, and outcomes).

Overview

The Platinum level is the place where you can really shine. There are three sections.

Two are required and one is optional:

- Strategy (required)
- Metrics (required)
- External Evaluations (optional)

Strategy

You have two choices. You can either:

1) upload your most recent strategic plan, as long as it is not more than five years old, or

2) answer the five Charting Impact questions below

Option 1

Export your strategic plan to a PDF document and upload. You can edit it to show the goals you have achieved prior to saving it as a PDF.

Option 2

If you don't have a recent strategic plan, list your agency's top three goals. Consider doing both, uploading your strategic plan and answering the questions. Particularly if your strategic plan is over two years old.

Make it easy for funders to learn about your agency. Fill everything out, even if you've already stated it in the Silver section. You'll want a complete report.

Your funders will probably compare your profile report with your competitors' profile reports.

Charting Impact Questions

Two are required and three are optional:

1. Problem Overview (optional)
2. What is your agency trying to accomplish (required)
3. Your strategies for making it happen (required)
4. Agency capabilities (optional)
5. Progress (optional)

Problem Overview - Optional

Give a brief overview of the problem you are trying to solve. Be sure it aligns with your Needs Statement in the Silver section.

What Is Your Agency Trying To Accomplish - Required

Choose your goals from the "United Nations Sustainable Development Goals for the year 2030." There are 17 goals listed on their website.

United Nations Sustainable Development Goals:

https://www.undp.org/sustainable-development-goals

Your Strategies For Making It Happen - Required

Strategies are the methods and objectives you will use to reach your goals. See the description in the Silver section above.

Agency Capabilities - Optional

Describe why your agency is capable of achieving its goals.

You will have the opportunity to list awards you've received later. You will also be able to list any collaborations you have.

Progress - Optional

Describe the progress you are making toward your goals.

You can be honest here, as you face many challenges on your path. Frame lessons learned in a positive way. Use the feedback you received to make changes to your program, if this applies. Be sure to emphasize your successes.

You have to have some type of measurement to see if you're making any progress. There are a lot of tests that will measure reading progress, for example.

Lofty goals, such as eliminating hunger or racism will be difficult or impossible to quantify. Eliminating hunger and racism are "visions," not goals.

Increasing local economic opportunities for BIPOC is a goal. Persuading local employers to adopt a DEI strategy is an objective.

Providing lunches for school age children during the summer is a goal. Feeding them in a park that has a playground is an objective.

They fit the SMART Goals format. These have methods and objectives. They are measurable. You'll know when you reach your goal.

You can research ways to measure attitudes or awareness. Surveys may be helpful.

Check with others in your field and see what measurement strategies they recommend. Even if you both are competitors, they care about the cause and will probably help you with this.

Metrics

Choose from a detailed list of metrics that Candid/GuideStar provides. You can also create your own if you don't find metrics that apply to your organization.

They offer a PDF version of the metrics. You can print it out and share it with your program staff and get their input.

They suggest choosing one to five metrics. You can choose up to 20.

Once you choose a metric, you will continue on to a dialogue box where you can add details. They will ask for the past three years of data if you have it available.

Four Optional Sections

1. DEI (Diversity - Equity - Inclusion)
2. Board Leadership Practices
3. How We Listen (Feedback Practices)
4. Additional Documents

1. Diversity Equity Inclusion (DEI)

Candid/GuideStar offers an excellent guide to help you gather DEI data. They have a link in the “2022 GuideStar Profile Standard” but here is a direct link to it. It is the same link as above:

https://cdn.candid.org/pdf/candid-dei-data.pdf

Required (to earn credit for completion)

- Leader, Board members, senior staff, key staff
- Equity strategies

Optional

- Number of staff in each demographic (there are four, the same as in the Gold section)
  - Race/ethnicity
  - Disability - ask for permission
  - Gender identity - decline to state
  - Sexual orientation - decline to state
- Equity strategies you use to increase diversity and inclusion

2. Board Leadership Practices

You are not required to have a Board if your agency is not an independently incorporated nonprofit.

Questions in the Board Leadership Practices are considered to be “best practices” for your Board. A few of the questions will be asked on the IRS F990.

If you have not adopted the best practices, consider discussing them at your next Board meeting. Candid/GuideStar describes why each question matters. You can print it up and distribute it to your Board before the next meeting.

The Board will have to discuss how they’d like to work with the questions. They could choose to address all the questions or take them one at a time.

3. How We Listen (Feedback Practices)

Describe the people you serve.

Choose from two sets of options. Answer the questions they ask. The questions are about how you’re getting feedback and how you’re using it.

They ask you to describe a recent change you made based on feedback you received. This may not seem easy at first.

But if you think about it, you’ll find great examples. Your programs evolved after receiving feedback. It is a source of pride for your program staff so don’t hesitate to ask.

4. Additional Information and Documents

Founding Information

You can list the year you were founded. Upload your letter of determination (IRS 501 (c) 3), and include the 509 (a) statement if you have it.

The 509 (a) statement from the IRS says something like "you're not a private foundation defined under IRC 509 (a) because you're described in IRC 509 (a)(2).

Donors can deduct contributions they make to you under IRC Section 170." The IRS mails them out after about a year. Foundations will ask for it so upload it.

Upload your most recent tax return (IRS F990).

Tax Returns

Just a reminder that this is for information only. It is not presented as legal oor financial advice. I am not an accountant or an attorney.

You can upload your tax returns long before Candid/GuideStar will be able to upload them. A lot of foundations and corporations do not want you to send paperwork. They will expect to see your tax return on Candid/GuideStar.

Do NOT include your Schedule B from your tax return when you upload it to Candid.GuideStar.

Schedule B lists your donors, their addresses, and the amounts they gave.

The IRS does not share your Schedule B with Candid/GuideStar or Charity Navigator. It's private. Delete this section before you upload it to Candid/GuideStar.

There are a few important issues about your tax return to discuss and address with your Board.

As a 501 (c)(3) nonprofit, you are legally required to provide documentation to the public if requested. Regarding your tax returns, the IRS states that you must provide the last three years of your tax returns if requested:

> "Returns must be available for a three-year period beginning with the due date of the return (including any extension of time for filing). For this purpose, the return includes any schedules, attachments, or supporting documents that relate to the imposition of tax on the unrelated business income of the charity."

The IRS website:

> https://www.irs.gov/charities-non-profits/public-disclosure-and-availability-of-exempt-organizations-returns-and-applications-documents-subject-to-public-disclosure

Additional information can be found at Public Counsel:

> https://publiccounsel.org/wp-content/uploads/2021/12/Public-Disclosure-of-Tax-Documents.pdf

You can "black out" or otherwise obscure your donors' names and addresses. You are not required to disclose your donors or their contact information.

I create three versions of the tax return:

1. Candid/GuideStar version without the Schedule B

2. Website and public version, with the donors' names and addresses blacked out on the Schedule B

3. Full legal version (for grants only) with the donors' names and addresses if requested by foundations.

Check the IRS website to make sure you are in compliance.

One important point: make sure the public can download your last three tax returns from your website for free. That makes you in compliance with the requirement to give copies when requested.

You are required, however, to allow the public to view them in person. Again, you should use the version with your donors' names and addresses blacked out.

Keep them in a binder. Make sure your office staff understands the IRS requirements and how to follow them.

You are also required to show or provide copies of all the materials you filed with the IRS Form 1023 or 1023 EZ to get your nonprofit designation. This includes all supporting materials that you submitted to the IRS and any communication from them about your request.

Make a copy of this and keep it in the binder with your tax returns. Label it and keep it in a safe, accessible place.

Consult with legal counsel as necessary to see if you can avoid giving any personal contact information.

For grants:

Many foundations will require you to submit your "full tax return" in a grant package.

The term "full tax return" means they require your full Schedule B. This is legal.

A foundation may require you to upload your full tax return to their online grant portal. It's OK, it's a private portal.

But don't upload your full tax return to any public website, including your own.

Keep your Board's personal information private. Do not use your Board members' home addresses on your tax return. Use your agency's address. This is legal and it is considered a "best practice."

If your Board members' addresses are listed on any of your last three tax returns, black them out before you upload them or give anyone a copy. Except foundations - give them your full legal tax return and don't black anything out.

Affiliations, Accreditations, and Awards

Affiliations

List any affiliations or agencies you collaborate with here.

Assessments or Accreditations

List any assessments or accreditations here.

Awards (listed as “External Organizations”)

You can list your awards, commendations, and memberships here. If your organization hasn’t received awards or commendations, ask for them. Ask your local government agencies for commendations.

The first step is to identify potential government agencies. It’s faster to Google something like “commendation from Los Angeles County” than it is to search their website.

For example, each Los Angeles County Supervisor has a website. The public can submit requests for commendations on it. Your area might have something similar.

You will have to provide justification for your request. They wouldn’t know what to write if you don’t tell them.

Check your city, county, and state to see if you can get commendations from them.

Sometimes you can receive your commendation at their meetings so they can get a photo. Be sure to get your own photo and use it.

Continuing with the summer reading program example, March is National Reading Month. It’s in honor of Dr. Seuss’ birthday.

March would be the best time to get recognized for a reading program. You can be part of the conversation if you pick the right time to ask.

It will take a while to get a commendation.

Government agencies approve commendations at their meetings. I’d suggest giving it at least two months and longer if possible.

Check the instructions and the FAQ’s on their website to see what you need to provide and how long it will take.

See if a Board member or community leader will nominate you for a commendation. Be sure to write it before you ask them. Your Board won’t know all the accomplishments you’d like mentioned in your commendation.

Let them edit it if they’re going to put their name on it, but write it first.

Thank you for reading this guide.

I’m sending you my warmest wishes.

The country needs a strong nonprofit sector,
now more than ever.

You are my heroes.

Other versions of this book, such as PDF, ePub, and audio can be found at:
https://auranel.com/nonprofit-fundraising/guidestar-profile/

More of my guides, information, and tutorials can be found at:
https://auranel.com/nonprofit-fundraising/

The fundraising guides are a work in progress. Check back to see what's new or subscribe to my email newsletter for updates. I send out emails once a month and you can unsubscribe any time:

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