It’s been a year.

This is the 2019 annual report from Candid.

In February 2019, Foundation Center and GuideStar joined forces to become 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 connects people who want to change the world to the resources they need to do it.
Welcome to the first annual report by Candid

It might seem like it was easy, but it took years of discussions, negotiations, and collaborative efforts for GuideStar and Foundation Center to join forces and create Candid.

For decades, both organizations had worked opposite sides of the same street: Foundation Center collecting data on foundations to help nonprofits find funding, and GuideStar collecting data on nonprofits to help donors make more informed giving choices.

As Candid, we have become the largest information source on the social sector—the people and institutions devoted to social good—in the United States and, increasingly, around the world.

The promise is immense.

Imagine a world in which nonprofits fill out a profile once, and it serves to represent them to donor-advised funds and online giving platforms, while fueling applications for thousands of foundation and government grants.

Imagine a world in which donors of all types know about everyone else who's working on their issues.

Imagine a world in which data brings light to critical discussions about how social sector organizations represent the diversity of the communities they serve.

Imagine a world in which a debate about the role of foundations and nonprofits is informed by a complete picture of how they contribute to society, rather than a single story about a billionaire’s latest gift or an organization's scandal. That is a glimpse of the world Candid is working to create.

Bringing the two organizations together to get a step closer to fulfilling this promise has required an enormous amount of unglamorous systems integration: payroll, benefits, budgeting, accounting, time
allocation, order processing, billing, CRM ... the list goes on. It has also required that we build the Candid Data System, a data warehouse capable of storing, transforming, and publishing all our data on the social sector to multiple products and platforms. And it has required doing so without interrupting the experience of more than 13 million users* who count on Candid 24/7 to get the insight they need to do good in an increasingly polarized and skeptical world.

None of what you’ll read about in the pages that follow would have been possible without the support of an incredibly conscientious board, the generous support of donors, and, above all, the hard work of an immeasurably competent and dedicated staff.

Candid may have terabytes of data, but it is our team of 230 people who daily turn our mission into reality: Candid gets you the information you need to do good.

Bradford K. Smith
President

*In 2019, Foundation Center web properties had 7.7 million users and GuideStar had 12.9 million users.
Here are some things we learned in 2019

Communication is key
Both with staff and external stakeholders, and before, during, and after a change

Use your board
Ours was critical to defining our vision and how we would work as one

Merging systems is a massive undertaking
More than half of our staff worked around the clock to bring 46 systems together

Find your people
Spending time getting to know people as humans helps the work move better, together

Adopt an adaptability mindset
Flexibility is required by all, and promotes innovation and smarter ways of working

Expect the unexpected
There are new opportunities and roadblocks at every turn; use them
Jeff Schum on how it felt to be one of the first Candid hires

I’m the marketing and demand generation manager. I work on our advertising, emails, and website, and support the direct sales team with lead generation and product marketing.

Before coming to Candid, I worked at Fidelity Charitable, a nonprofit in Raleigh, North Carolina, doing the same type of work: marketing, email, databases. I relocated to the Washington, D.C., area because of my wife’s job.

Candid’s new name was unveiled about three or four months before I started. I knew about GuideStar, because that’s who we had worked with at Fidelity Charitable. I knew a little bit about Foundation Center, but not quite as much. I knew that they had come together, just from being in the nonprofit space, but I hadn’t dived too deep.

During the interview process, we had lots of conversations about how much it’s a work in progress, but the position felt comfortable. I liked that the name was short and everything was to the point: naming, colors, branding. I thought it was very eye catching.

Did I think it was a mess or that it was exciting? A bit of both. Exciting in the sense that you can look at things from a new angle and do things a different way. And obviously, I was a little anxious, wondering, how’s this going to come together? How are the teams going to mesh? Being one of the first hires after the merger probably made it a little easier, not really having the history of being on either side.

Day to day, I work to help the sales team market our products to the nonprofit sector. I work a lot in HubSpot, our marketing automation tool, looking for new leads for the sales people to talk to, and deploying emails to help generate interactions. People come organically through search and advertising, and I’m constantly looking at the database, trying to find users that look like current customers. I make sure that they meet our qualifications and serve them up to the sales team to make contact.
After, we look at which ones the sales team accepted and worked with, and which ones weren’t good, so we can push more of the good ones. We really try to follow through on the leads. Do they turn into opportunities and sales? How do they use the website, and what do they search for? I definitely get a lot of feedback, too: “Have more of these, fewer of these.”

The first really big project I worked on when I started was the Compensation Report marketing. I’ll be involved in the Salesforce integration project going forward. And I need to jump more deeply into the Profile Update Program marketing! It’s been nice to contribute to a wide range of things every day.

Candid is a great place to work. Everybody here is very mission driven. We try to put the data in the right people’s hands to do good, whether it’s training, webinars, blogs, or conferences. We all try to help expand the sector. Everybody’s relaxed and has fun, but gets the work done.
Why Candid? It took us and our teams months to figure that out. But the fact that so many people ask that question is part of the answer.

Candid is always asking questions about the world and how you can make it better. But one question we have heard a lot over this last year comes in many forms: Why is our name Candid? What kind of name is Candid? Or just: Candid?

The short answer: Our organization (and the two that came together to make it) is dedicated to sharing information. As the mission statement says, Candid gets you the information you need to do good. The name Candid is a way to deliver that message that’s short and to the point (and legally available for use by a nonprofit organization like ours).

The longer story: The words we use to deliver messages matter, even if there’s only one of them. Just like a logo (like our nice lettering with a period at the end) or a color palette (ours is black and white, with highlights), every detail is important. What do the words mean? What tone do they convey? What do they make you think of?

Foundation Center and GuideStar began working with a brand consultant, Open, to develop a brand identity for our new organization back in the fall of 2018. A working group that included people from both organizations met often with Open’s team, first to get to know each other and then to figure out what this new organization would be.

The group talked a lot about how companies merge and how they come up with their new names. Usually a name has a job to do. Sometimes it has to do more than one job. So we had to decide what jobs our name had to do. Should we sound like an institution? Or a start-up? (We’re both.) Should we leverage our past? Or promise some kind of future?

Open shared many names that did all kinds of jobs. Some tried to make you feel warm and fuzzy (“Together”). Some wanted to explain (“Rationale”). Some sounded like tech companies (“Tangible”). Some
sounded like nonprofit institutions or the ideas behind them (“Public Interest”). Eventually we decided what our name’s job would be.

Foundation Center and GuideStar came together to form a unique organization positioned to define and transcend our sector.

Others thought it sounded like a friend who always tells you the truth. Candid can deliver bad news and still be all about doing good. In the end, both of these reactions are just fine with us. Why?

Our name needs to get attention by making people think, both when they hear it the first time and every time after that. That’s because Candid's job is not just to share information, but to make people think about what to do with that information.

Both Foundation Center and GuideStar were created to provide trusted, accurate, and objective information about the nonprofit sector. In naming our new organization Candid, in a time when people are skeptical of so much of the information they receive, we decided to lead with our most valuable asset—trust.

See the world. Make it better. That’s what we want you to do, and that’s why we’re Candid.

**Gabe Cohen is senior director of marketing and communications at Candid.**
How two boards of directors became one

by Jen Bokoff

We wanted to make sure our boards came together as smoothly as possible.

In 2018, each of the two boards named four trustees to be part of a working group, informally known as the “4+4 group.” Their task was to review what would become Candid’s governing rules, or bylaws, determine the structure of the board, establish term limits for trustees, define a process for selecting the chair, and develop other agreements for working together.

In doing so, they made a number of key decisions.

First, they agreed that the Candid board would be created simply by combining the GuideStar and Foundation Center boards into one, while respecting existing term limits.

Second, they took the best of both organizations’ existing practices and came up with a hybrid model of four board meetings per year: two virtual and two in person.

The only difficulty came in picking a single chair to lead the board, which was resolved by having the existing chairs of both boards—Mari Kuraishi of GuideStar and Clotilde Perez-Bode Dedecker of Foundation Center—serve as cochairs during Candid’s first year.

Under Candid’s bylaws, trustees are elected for a three-year term and can be reelected twice, for a total of nine years.

Six of our trustees will roll off the board in early 2021. And we are in the process of adding new board members who have no prior allegiance to Foundation Center or GuideStar. They will be 100 percent Candid.

Jen Bokoff is director of stakeholder engagement at Candid.
Bradford K. Smith:

I have worked with many boards in many different capacities throughout my career. We are so fortunate to have this group of people on our team.
Can someone explain why it costs $27 million to do a merger of fdncenter and guidestar into @CandidDotOrg?

Jacob Harold
Executive Vice President
@jacobcharold:

Yes, it is a fair question. I’ll do my best to answer! It comes down to the costs of technology at scale. Between GuideStar and Foundation Center, we were managing about 4 billion pieces of data and serving 17 million users. That was and is very costly.

~80 technologists, cloud fees, software infrastructure, training, etc. (Not to mention fending off tens of millions of cyber attacks each year!) And that is just for maintaining the status quo. Weaving together two large organizations multiplies the complexity and cost.

And the $27M we’ve raised for integration so far is spread over three years. So, on average, that’s $9M a year which is less than a quarter of our budget. And we face much more than just technology integration costs: legal bills, combining offices, communications, and more.

It also includes the general operating support we likely would have received from these funders in the absence of the combination. And I will speak from experience that these foundations did extensive due diligence to check our numbers!
What it cost to integrate two big nonprofits

by Lisa Philp and Aleda Gagarin

We designed a fundraising campaign that was crucial for the successful integration of our new organization, blending our teams, and keeping unrestricted contributions flowing.

All of our integration funders were major donors to Foundation Center, GuideStar, or both organizations. Their support has grown out of deep relationships that we cultivated over time. These relationships have been nurtured by the hard work of many Candid staff over the years. These funders see us, know us, and trust us—and that’s priceless.

The leadership demonstrated by our boards made all the difference in inspiring confidence about integration. Our presidents spent a significant amount of time meeting with donors to make their case, answer hard questions, and pave the way for formal invitations to apply.

Once we got the initial agreements from the donors, we got to writing, budgeting, answering questions, being persistent, demonstrating patience, negotiating, and following up. We took the early concept notes, Gantt charts, and preliminary budgets, and shaped them into tailored requests.

The Lodestar Foundation was our first supporter, with a grant of $60,000 in May 2018 for preintegration due diligence. A main focus of their giving is to encourage long-term collaboration, including mergers. They also funded a study about integration back in 2012, which planted a seed we realized seven years later.

The Fidelity Charitable Trustees’ Initiative, a grantmaking program of Fidelity Charitable, which supports nonprofit infrastructure, provided support shortly thereafter for additional due diligence as well as for branding and communications.
And then things really got rolling in October 2018, when the Bill & Melinda Gates Foundation approved its multi-year commitment of $16 million—one of the largest grants they have ever made for philanthropic infrastructure. Having the Gates Foundation's early and significant support was extremely critical to the success of our integration campaign.

Another big form of assistance that came along the way was an early challenge grant of $1.5 million over three years, by the Wallace Foundation (which was released when we demonstrated that we had raised $35 million). The fact that a foundation of their size committed that large of a gift encouraged foundations with three, four, or five times their endowment to step up.

For 15 additional integration donors, we used our own product—Foundation Directory Online (FDO)—to research who could support us, based on their giving, both overall and especially to other philanthropy support organizations.

A valid concern about this type of campaign fundraising was the possibility it would cannibalize other key sources of funds, such as unrestricted grants. Recognizing this, we made general support one of the four pillars of our overall campaign budget and asked each of our donors to commit to three years of giving at our combined, preintegration level. We are thankful that most have honored this approach and understood that our need for unrestricted support did not decline during integration.

The other three components of the campaign budget included the hard costs of integration (consultants, staff time, travel, other direct and indirect costs), an Anchor Fund for sustainability, and an Acceleration Fund to spark innovation.

Candid's integration campaign helps us continue to fulfill our mission, combine dozens of back-end and forward-facing systems, and invest in the future of an organization worthy of our sector's trillion-dollar scale and world-changing ambition.

Lisa Philp is senior advisor and Aleda Gagarin is senior director of development at Candid.
Candid’s data

Candid manages terabytes of data about nonprofits, foundations, and grants. We put it in our products and are relentlessly working on improving its quality and our analyses.

**Number of grants in FDO**

2015 — 5,400,000

2019 — 16,700,000

We completely redesigned our Enterprise Database Management System (EDMS). Now, we have 10 times more grants data in our products and services than we had in 2015. In previous years, our staff hand coded data into our taxonomy at the rate of 300,000 grants per year. In 2019, our EDMS processed and indexed 3.4 million grants.

**Number of nonprofits that share enough information to earn a Seal of Transparency**

2018 — 66,602

2019 — 77,129

**How we listen**

Collecting feedback is becoming a core practice of the sector, and we are part of building the momentum for that movement. In 2019, we began collecting and sharing information about the feedback practices of nonprofit organizations through our GuideStar Nonprofit Profiles by Candid.

20% — median gender pay gap at organizations with annual budgets greater than $50 million

**Number of nonprofits in the GuideStar Pro database**

2015 — 2,400,000

2019 — 2,870,000
*Historic (revoked, mergered, defunct) and current organizations

1996 — the year GuideStar launched its website, featuring information on 40,000 public charities

Between 2007 and 2016, assets in donor-advised funds (DAFs) nationwide increased from $32 billion to $85 billion. We have updated our search filters to make it easy to find DAFs in FDO.

California — the state with the most FDO subscribers

1960 — the year Foundation Center published its first foundation directory book. Now, our grant data is published much quicker and online

**Candid @CandidDotOrg:**

**12:01pm, Feb. 3, 2020**

Last year, Candid made philanthropy history! The Foundation Directory was featured as a part of the Giving in America exhibit, at the Smithsonian.
Our products

Foundation Directory Online

Foundation Directory Online (FDO) is a fundraising database that gives grantseekers access to the largest amount of clean and coded philanthropic data in existence.

FDO makes fundraising quick and efficient by combining data with intuitive search functionality and informative data visualizations.

fdo.org

GuideStar Pro

GuideStar Pro offers insight into the entire landscape of nonprofits in the United States. Thousands of funders, donors, and nonprofits use it to search for and analyze individual organizations and cohorts. It provides users with the information they need to learn about nonprofits, make smarter funding decisions, and build connections.

learn.guidestar.org/products/guidestar-pro

APIs

APIs—application programming interfaces—allow platforms to automatically integrate information from our database. They enable partners to verify that a nonprofit is eligible to receive tax-deductible donations, disperse donations to selected nonprofits, auto-populate nonprofit application forms, and provide in-depth information about millions of nonprofit organizations.

candid.org/use-our-data
Candid provides analysis of 2017 compensation for 162,853 nonprofit employees

by Gabe Cohen


Overall, nonprofit CEOs saw modest compensation increases in 2017. Median compensation of female CEOs continued to lag behind that of their male counterparts, however, although the gap has narrowed over the years. The number of female CEOs has increased since 2005, but there were only slight increases in the percentage of women leading organizations in any budget category in 2017.

The report also examines changes in incumbent compensation at 79,910 organizations.

“With one exception, median compensation increases for incumbent CEOs were lower in 2017 than in the previous two years, sometimes dramatically so,” noted Jenna Allen, data reporting analyst at Candid and author of the 2019 report. “The exception was for men at organizations with budgets of $250,000 or less. They saw no increase in 2016 and a 1.3 percent increase in 2017. Increases by gender in 2017 also varied from previous years. In 2015, women experienced greater increases than men in six of nine budget bands. In 2016, women saw greater increases than men in seven budget bands. In 2017, men experienced greater increases in six budget bands.”

Science and health organizations had the highest overall median salaries. Religion and animal-related organizations brought up the rear.
The report is available for purchase.

Gabe Cohen is senior director of marketing and communications at Candid.
Systems integration

Systems integration was a critical behind-the-scenes effort at Candid this year, and our finance, tech, and human resources teams worked hard together to make sure our team got paid and that we could properly report to funders on our spending.

Deb Snider
Senior Advisor:

12:20pm, Nov. 8, 2019

The Candid payroll button successfully got pushed at 3:00 yesterday afternoon using our new UltiPro payroll and HR system! I want to take a moment to celebrate this truly Candid achievement.

This project is a real testament to how much stronger we are as a combined entity. The UltiPro team represents a cross-departmental, cross-classic organizational team that worked tirelessly to bring you this more transparent, more user-driven, more efficient system.
Five new free trainings offered in 2019

1
Is starting a nonprofit right for you?

2
Shifting the narrative to advance racial equity

3
Skills for overcoming burnout—refueling the fire

4
Impact measurement: learning how to listen

5
What’s next for corporate philanthropy?
Launch day chronicles

Jen Bokoff and Gabe Cohen, Candid blog

8 am, Feb. 6, 2019

We hope you saw yesterday’s announcement that Foundation Center and GuideStar have joined forces to create a new nonprofit named Candid. For now, it’s business as usual for our collective products and services. We’ll keep you posted as activities and offerings evolve.
It’s been a year

A lot has happened in 2019: we became Candid, joined our boards, combined our staff, launched new products, moved offices, went on a staff retreat, and rolled out a new website.

**February 2019**

February 5
Launched Candid

February 18
Our first Candid 101 webinar, featuring president Brad Smith and executive vice president Jacob Harold

1,045 people from around the world tuned in to hear us talk about how and why Candid came to be, and what to expect in the months ahead.

February 23
First virtual meeting of the Candid board

**March**

March 11–13
Foundations on the Hill Conference

Worked with Congress and the United Philanthropy Forum, participating in regional legislative meetings with Philanthropy California and Philanthropy Northwest.

**Best moment of the year?**

“Representing Candid at Foundations on the Hill, and bringing our data to inform and shape many conversations.”

C. Davis Parchment

March 13
Presented at the PEAK Grantmaking Conference

Jen Bokoff:
12:03 pm, March 13
Our crew here at PEAK had a great conference despite being stranded in a wacky blizzard!

April

April 8
Went to Serbia and hosted our first international roundtable meeting, discussing building the field of community philanthropy in Brazil.

April 30
Candid's culture ambassador retreat in New York City, where selected staff influencers across all teams came together to discuss our culture before, during, and after the change.

May

May 6
Launched a single, combined platform for all Candid webinar programs.

Best moment of the year?

“Getting the new Candid webinar program up and running—a great example of new colleagues coming together to work toward a common goal.”

Arielle Frazier

May 13
First in-person Candid board meeting, in New York City

May 29
Announced recipients of the inaugural #OpenForGood Award

The #OpenForGood Award was designed to recognize and encourage foundations to openly share what they learn so we can all get collectively smarter. Part of a larger #OpenForGood campaign, it includes a set of tools to help funders work more transparently. The Award started in 2017.
June

June 13
Launch of the self-paced Nonprofit Startup Assessment Tool

This free 75-question online diagnostic survey was created to assist nonprofit founders and early startups navigate financial capital.

June 17
Moved Atlanta office into shared space at the CARE Global Innovation Hub

June 24
Alliance magazine featured Candid's Lauren Bradford as coeditor of a special edition on peacebuilding.

July

July 1
Launched the 2019 Columbus Survey

We expanded our reporting on donor-advised funds in our report benchmarking community foundation operations and spending.

July 8
Two legacy support teams, Online Librarian and Stakeholder Support, joined to form one service: Candid Support.

July 15
Participated in the United Philanthropy Forum conference to learn from peers at other infrastructure organizations, and to build a network.

Lori Guidry:

10:36 am, July 22
The West Coast move is over! Candid has come together in Oakland. Monday was the first day for the combined staff.

September

September 2
Released LATINXFunders
LATINXFunders is a new dashboard and research project developed in collaboration with Hispanics in Philanthropy. It documents the landscape of foundation funding for the Latinx community and tracks changes in its scale and priorities.

September 6
Soul of Philanthropy exhibition opening in Cleveland

The exhibit uplifts and amplifies the power of Black philanthropy.

**Best moment of the year?**

“Watching my coworkers create the Soul of Philanthropy series of events in Cleveland. It was moving and inspiring.”

Dave Holmes

September 9
Rolled out candid.org

September 23
Launched Investing in Native Communities

**October**

October 7
Defined Candid’s values: driven, direct, accessible, curious, inclusive.

October 10–11
Network Days in New York, with 65+ partners joining in person and another 150+ partners joining virtually for two days of learning

October 14
Hosted 25 next-generation donors from the Toronto Foundation at a half-day program we designed to highlight overall trends in community philanthropy.

October 21–22
Held our first staff retreat—Candid Convene—in Baltimore, where 200 staff from 36 cities and three countries gathered over two days

**Best moment of the year?**
“Candid Convene”

Robin Burdick, Douglas Moore Jr., Beth Culp

October 28
Completed Candid 2030 strategic plan listening tour, including a survey, interviews, and staff engagement.

November

November 11
Combined D.C.-based Foundation Center and GuideStar teams into one office at H Street NW.

November 18
Launched UltiPro, new unified HR, payroll, and time-management system for staff.

November 25
Created a prototype that combined real-time data from multiple products into a single mobile app.

December

December 2
Moved Cleveland office into coworking space at the Midtown Tech Hive.

December 3, Giving Tuesday
Candid Support team provided excellent turnaround time on a day when volume was 4x normal.

December 9
Launched Tipalti, a new automated accounts payable system for staff.

December 16
Reached $40 million target for the integration campaign

December 23
Created successful proof of concept of combined data systems, which will begin implementation in 2020.
The data feeds GuideStar Pro, FDO, Foundation Maps, our APIs, managed data sets, and all of our research initiatives. And now, the data will be streamlined, cleaner, and better.

December 30
We embodied our “more data, faster” mantra by launching the second of two updates to the Peace and Security Funding Index, far ahead of our regularly scheduled updates.

**February 2020**

February 1
Added six new Training Tier Funding Information Network (FIN) partners, bringing the total to 19.

February 18
Kicked off Salesforce migration process.
Every launch has a flub

Jen Bokoff
Director of Stakeholder Engagement
@jenbo1:

9:28 am, Feb 5, 2019

Replying to @TweetTylerOrr and @TwitterSupport: THANK YOU
TYLER YOU ARE MY NEW HERO.

8:03am, May 15 2019

Gift note: Tyler, you are truly a lifesaver! THANK YOU for resolving our
Candid launch day scare so quickly and for your kind follow-up help
after. We appreciate you!

In case anyone’s curious why Tyler got a little gift from the @
CandidDotOrg team, here’s a short story about the one major “oops” of
our launch:

8:04am, May 15 2019

Launches can be planned head to toe and then some, but there
will still be things you didn’t know to anticipate. We had a morning
crew set to switch over our social media handles. When we did that,
the embargo on the news was released and launch comms got put
into motion.

8:05am, May 15 2019

It went so smoothly! It felt great! We even had time to clean up our bios
on the social media pages. I thought I’d tackle that quick task in the lag
time before the email blasts went out so it was all perfect.

8:06am, May 15 2019

Among other things, I updated our Twitter birthday to February 1,
2019, the legally official day that Foundation Center and GuideStar
joined forces. I hit save...
...and we were immediately kicked off Twitter because we were tweeting as a baby!!! Ahhhh! DID NOT SEE IT COMING.

8:08am, May 15 2019

It was 6am on the west coast (where Twitter is based) and finding contacts for a minor crisis to us but a nonissue in the scheme of the world was hard. Thankfully, my colleague Gabe remembered getting a nice guy’s card a few months ago.

8:09am, May 15 2019

We called on a whim, and magically, Tyler picked up! He couldn’t have been more kind and gracious if he tried. Within hours, we were back tweeting!

8:11am, May 15 2019

Lessons: It’s OK to laugh even in stressful situations. Nothing is detrimental. Don’t panic. There are great humans out there. Teamwork makes the dream work. And remember, babies shouldn’t be on the internet!
2019 Candid Zoom statistics

August — month with most Zoom meetings

89,065 minutes Crystal Mandler, Candid's #1 Zoom user, spent on the line

14,626 — total number of Zoom meetings in 2019

1,760,945 minutes spent on Zoom calls
Soul of Philanthropy exhibit

5,000 visitors who came to see the Soul of Philanthropy exhibit in Cleveland, organized by Candid Midwest in partnership with The United Black Fund of Greater Cleveland
New demographic data on Nonprofit Profiles promotes diversity, equity, and inclusion

by C. Davis Parchment and Eva Nico

Who are nonprofits here to employ, serve, and fund? This year presented Candid’s first opportunity to encourage the organizations we work with to be more transparent by refining the demographic data they share.

As the largest source of reliable information about the nonprofit sector, we have a responsibility to keep improving the data we make available through GuideStar Nonprofit Profiles by Candid. The need for improvement comes not only as a response to the demands and conversations of the field, but out of our commitment to inclusion and accessibility. We hope to redress structural inequities in philanthropy by centralizing critical information needed to foster honest dialogue and growth.

Now, Nonprofit Profile questions include:

- Demographic data about the individual leaders and coleaders of an organization
- Updated breakdowns by race and ethnicity
- Aspects of gender identity, sexual orientation, and disability status for board members and staff
- Equity-focused organizational practice questions
- Additional checks to improve information quality

Answers to all of these questions are publicly available.

The nonprofit field has met the new survey with enthusiasm: almost 2,000 organizations have shared meaningful information. We plan for the updated survey to replace older, individual foundation surveys and begin to centralize demographic data about the field in a way that
allows for deeper analysis about the “who” in the sector and whether grants are reaching their intended beneficiaries. We encourage foundations to consider requiring this survey of all applicants.

This work was made possible with extensive collaboration with partners across the field, but primarily CHANGE Philanthropy and Equity at the Center.

We deepened our partnerships with CHANGE Philanthropy, PEAK Grantmaking, and D5 Compass to develop joint messaging about best practices in collecting and sharing demographic data. Our first presentation, hosted by Philanthropy California, included almost 70 funders. The road show will continue in 2020.

This year, our partnership with CHANGE Philanthropy will take on new dimensions including an exploration into a taxonomy update for the Philanthropy Classification System to more accurately track demographics and to better address the intersectionality of identities in the data. We will also plan to pilot several data collection initiatives through the CHANGE network.

C. Davis Parchment is director of partnerships, Candid West, and Eva Nico is senior director of programs at Candid.
Investing in Native Communities: acting on our commitment to create lasting change

by Sarina Dayal and Supriya Kumar

Effective philanthropy is about more than just donations. It's about developing authentic and reciprocal relationships, expanding community input, advocating for better data and shared knowledge, and committing to change. Investing in Native Communities was our way to uplift those practices in 2019.

Native communities have historically been underfunded by the philanthropic sector. Too much of their story remains invisible to policymakers, mainstream culture, and philanthropy, with only 20 percent of large U.S. foundations giving to Native communities and causes. Many of these donations occur intermittently, leaving long-term relationship building between Native communities and the philanthropic sector to be incredibly challenging.

We developed Investing in Native Communities, a free, public website focused on philanthropic funding for Native American communities. It centralizes and provides access to crucial information needed by foundations that are interested in supporting Native communities and causes. In addition to a historic timeline written from a Native perspective, the site has an interactive philanthropic funding map, news stories, a social media feed, and research on funding related to Native Americans.

To ensure that we were creating a platform that would be useful for the sector, we partnered with Native Americans in Philanthropy and gathered their insights.

It was key to developing the project. We also consulted with Indigenous program officers and foundation staff to find out which
resources funders need and how to increase investment in Indian country.

Our partners and advisors challenged us to step back, slow down, and critically examine how we designed our resources and the message we were sending to the field. This process included details such as the iconography and imagery on the website to how we shaped the story the data told. Many aspects of putting this project together were challenging, and the work and conversations took us in directions we didn’t expect. But we knew going down this path would get us to the right place in the end.

Our conversations illuminated innovative ways funders evolved their practices to better support Indigenous communities. One thing we heard from nearly everyone we spoke with was how vital relationship building is to this process. And that takes time.

We realized there was a lot we didn’t know, especially around Native American history: the history and trauma these communities have endured, but also stories of resilience, opportunity, and powerful philanthropic initiatives. What we knew about Indigenous peoples was primarily drawn from our education or from the media, where Native voices are repeatedly absent or mischaracterized.

It was clear we needed “Native 101” component to the project to broaden foundations’ understanding of Native peoples and how historic injustices continue to impact their communities. The burden of educating funders about the challenges and needs of Native communities should not fall on Native peoples themselves.

A lot can be understood through existing resources and peers, so Native peoples should not need to spend their time with funders offering context for their challenges, solutions, and work.

We also used the help of our partners to improve the quality of our data. Automated processes we employed to identify grants that benefit Native communities often didn’t have enough information to make the determination to apply for those grants. We reached out to 61 funders to ensure that we had accurately captured their grants for Native communities. We ended up working with 35 funders to verify
and improve the quality of their data in our database—an ongoing process we hope to continue engaging in.

It was a truly organization-wide effort to conceive, fundraise for, build, and promote this work. Bringing it to life required trusting our partners and viewing them as the content experts as well as ensuring open communication with our colleagues across different departments and stakeholders.

We hope Investing in Native Communities helps funders to change their practices for more intentional, sustained support for Native communities.

Access the project at nativephilanthropy.candid.org.

Sarina Dayal is associate and Supriya Kumar is research manager, global projects & partnerships at Candid.
Kathye Giesler, after 23 years at the organization, still learns something new every day

My job title just changed to software engineering manager. I’m on the data science team, which works on projects like the recent mobile app that combined data from Foundation Center and GuideStar. I have two direct reports focused on quality assurance, both automated and manual—like me, they are always up for new tasks.

I started working with Foundation Center 22 years ago as a part-time editorial assistant. I had a background in computer science, and had been working with computers for a number of years before, but I decided to do something different. The job paid $8 an hour and lasted about six weeks, before my boss at the time reread my résumé and said, “Come on, let’s get real here. You’re underemployed.” I moved over to an open position in the tech department. In hindsight, it was the right move for me.

Shortly after I started in the data management department (part of the tech department), I hired Emmy So, who’s still at Candid. The two of us managed a computer that was a dinosaur—just ancient—different from what’s used today: a hierarchical rather than a relational database. Emmy and I got through about six or seven years with it, but we were glad to change to new technology, finally. And now we’re moving on to cloud and other technologies. Quite a difference from the “green bar” paper days.

I really didn’t know anybody at GuideStar until we merged. I had, of course, heard of them, and knew we had a partnership with them on the IRS data. But I work further down the pipeline, after the data is in the database. The mobile app was my first opportunity to collaborate with the GuideStar team.

Working together has been very good. We share knowledge, look at the best way to do something, and go forward with it. We’re combining the databases now, and the result will be better products for users.
What I’ve always liked the most about Foundation Center has been the opportunity to keep learning. That has continued following the merger.

I’m a problem solver. I look at learning new software, new techniques, new technologies as a puzzle. I’m sure there are people who are less fond of change, especially when it comes too fast, but change doesn’t bother me.

These past few weeks, I’ve worked with a small team on creating a dashboard to display some metrics on data flowing into our products. It has been a chance to learn something new and gain experience with a new querying language, monitoring, and data visualization software. I also took a class on an open source search engine—all of this since the beginning of the year!

The name Candid has grown on me. I like that it’s shorter than Foundation Center.
Transition in numbers, according to staff

On scale of 1 to 10, how challenging was the transition to Candid?

11.8% — 1
5.9% — 2
11.8% — 3
5.9% — 4
5.9% — 5
5.9% — 6
23.5% — 7
23.5% — 8
5.9% — 9
0% — 10

On scale of 1 to 10, how excited were you about the transition to Candid?

0% — 1
5.9% — 2
0% — 3
0% — 4
0% — 5
5.9% — 6
11.8% — 7
23.5% — 8
<table>
<thead>
<tr>
<th>Percentage</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.6%</td>
<td>9</td>
</tr>
<tr>
<td>35.3%</td>
<td>10</td>
</tr>
</tbody>
</table>

**How many new Slack channels have you joined?**

- 82.4% — too many to count
- 5.9% — six
- 5.9% — three
- 5.9% — two

**How many new Candid colleagues have you worked with?**

- 46.7% — 6–10
- 33.3% — 11–20
- 20% — 21+

**How many new projects have you started?**

- 82.4% — over six
- 23.5% — three
- 17.6% — two
- 11.8% — one
- 5.9% — five
Candid survey concludes philanthropy should do more for global peace

by Lauren Bradford and Barry Knight

Last year, Candid and Centris, with support from PeaceNexus Foundation, conducted a survey, Philanthropy for a Safe, Healthy, and Just World. The results, based on 823 foundation responses, reveal philanthropists can do better to support global peacemaking efforts.

The world today continues to be shaken by armed conflicts, yet, according to research by Candid, peace-related grantmaking comprises less than 1 percent of all grants.

Our study found the actors most committed to peacebuilding were nongovernment organizations and civil society organizations. Endowed foundations, on the other hand, were found to be the least committed to peacebuilding.

The most commonly cited reasons for engaging in peacebuilding work were commitment to dealing with the root causes of social issues and alignment with the values of the organization and its trustees. The most commonly cited reasons for not engaging, on the other hand, were because the work is too political and because there is not enough evidence for what works.

Only 18 percent of survey respondents indicated that conflict transformation and peacebuilding were “very important” to their work; in fact, it ranked at the very bottom of the list. Still, 57 percent of respondents said that supporting resilience and stable societies—a key component of peacebuilding—is either important or central to their work.

It was more common for grantmakers to see their work through the lens of social justice or human rights than through the lens of peace, with half of respondents reporting they worked on “social inequalities and economic justice,” and a third saying they worked on human
rights. These findings suggest that social and economic justice and human rights are more broadly understood and accepted than peace.

Many who are not engaged in peacebuilding cited it wasn’t relevant in the regions where they work—this narrow view of peacebuilding is limited to specific areas where extreme conflict likely inhibits greater engagement.

We deeply believe the need to find successful interventions to solve the issue of foundations’ limited involvement in peacebuilding is urgent. Philanthropy can be a great partner in helping countries going through a peacebuilding process to create equitable societies with wide access to education, healthcare, and freedom of expression. It can play a unique role in conflict resolution, because it possesses three essential qualities: a moral compass, financial resources, and patience.

Lauren Bradford is senior director of global projects & partnerships at Candid. Barry Knight is secretary of Centris (Rethinking Poverty).
2019 product launches by Candid

**Investing in Native Communities**

with Native Americans in Philanthropy

**Scholarships for Change**

funded by the Ford Foundation and the Andrew W. Mellon Foundation, with many advisors

**LatinxFunders**

with Hispanics in Philanthropy

These launches were possible because of our partners, who provided critical expertise and shaped our products. As Candid grows, developing partnerships will continue to be a cornerstone of our approach.
2019 training by the numbers

More than 16,000 attendees at in-person classes

44,000 registrations for webinars and online classes

1,785,607 visits to GrantSpace, Candid’s learning community that helps nonprofits become more viable grant applicants and build strong, sustainable organizations
Social Sector Unite!

18 watch parties held across North America for Social Sector Unite!—an annual program to advance trust-based philanthropy
Our hopes & dreams

What do you wish you knew a year ago?

“How much I would enjoy getting to know new colleagues”
Robin Burdick

“How long it would take to transition our programs and platforms”
Arielle Frazier

“The administrative passwords for all of the laptops that we moved to a new location”
Dave Holmes

“The name for the new organization”
Beth Culp

What surprised you this year?

“How well the transition has gone”
Robin Burdick, Beth Culp, Regina J. Faighes

“How much we have going on”
Arielle Frazier

“Positive culture”
Douglas Moore Jr.

“How excited colleagues are when they learn I joined since the merger”
Devin Harvath

What are you looking forward to?

“Learning new technologies”
David Barr
“More unity”
C. Davis Parchment

“Being truly one Candid”
Suzanne Coffman

“Helping people in all those ways that make nonprofits special”
Barbara Cornell
Candid Convene was our first staff retreat, bringing together 200 employees from 36 cities and three countries.
How Candid is building an intentional and inclusive company culture

by Zahra Bokhari

Foundation Center and GuideStar had very distinct cultures. We want to ensure the culture we build for our new organization is intentional, integrated, and reflective of our values, our mission, and our talent.

To build Candid's culture, we formed the Change Management & Culture Workstream Group, a group of staff that included colleagues from various departments, tenures, levels, backgrounds, and geographic locations.

Through online surveys and small group discussions, we sought the input of all employees to ensure all voices were heard and that staff were empowered to share their experiences. This process helped us uncover the strong desire for continued intentionality around creating an inclusive, equitable, and diverse culture. That has been at the forefront of our work throughout the change process.

The team was able to come together to develop Candid's values: driven, direct, accessible, curious, and inclusive; put forward culture recommendations; and even plan and execute Candid's first-ever staff retreat.

The culture recommendations, which we have already begun rolling out and will continue to build upon in 2020, aim to increase communication and transparency, demonstrate the human resources function in a more robust and affirmative manner, provide greater support for staff connections (SpotiFriday in New York, Hawaiian shirt Fridays in Williamsburg, and Guac-o'clock in Oakland), and more.

Our first staff retreat, Candid Convene 2019, brought together 200 Candid employees and allowed them to build personal connections, whether it was in the conference room discussing Candid's
2050 strategic plan, or in the break room playing a game of Dungeons and Dragons.

“Building culture” never has an endpoint; it’s iterative. This year, with a more established culture plan, we can iterate with greater intention and direction.

**Zahra Bokhari is development specialist at Candid.**
Why we like each other

We asked Candid employees who started at different organizations to highlight someone they only met this year but already admired and respected. Then we interviewed employees who picked one another.

Arielle Frazier and Sarina Dayal

Arielle Frazier, marketing and outreach manager, and Sarina Dayal, associate, global projects & partnerships, share a love of pottery.

Sarina: We met right during the chaos and excitement of the launch. Amidst it all, Arielle was an amazingly calming, organized, and positive presence. She was great to partner with in the early days while we were getting familiar with each other’s work and navigating new responsibilities, and she asked smart, critical questions.

Arielle: Sarina has a very positive attitude; she is easy to work with, and is always willing to pitch in and help in any situation. She has taught me a lot about the Knowledge Services team and the incredible work they do for the sector. She was very patient with me as I got up to speed on the way Foundation Center had been managing their social media strategy.

While at Candid Convene, Sarina and I bonded over our love for making pottery. We both find the art of the pottery wheel very therapeutic.

Sarina: This was such a nice memory! It was great to connect about a thing outside of work that brings us both a sense of balance.

Regina J. Faighes and Tom Barr

Regina J. Faighes, senior editorial associate, large foundations, and Tom Barr, senior director of software engineering, met when Regina came to visit the Williamsburg office. They strengthened their friendship at the company retreat.

Regina: Last October, several of my New York colleagues and I visited our Williamsburg office, and Tom was the person who greeted us at
the front door. I was immediately impressed by his warm smile and friendly demeanor.

Tom: Regina and I hit it off immediately. She seemed to enjoy my sense of humor which, as anyone from GuideStar could have warned her, simply encourages more of it.

During our Colonial Williamsburg tour she was a gracious and interested audience, which again, simply encouraged me to talk even more.

Regina: Tom has an encyclopedic knowledge of history. He was so helpful and gave us an informative and interesting tour of the office, took the time to walk us through some of the GuideStar products and services. He even brought in a bunch of his Hawaiian shirts for us to wear for the Hawaiian Shirt Friday!

Tom: She was a good sport about wearing a Hawaiian shirt in honor of Hawaiian Shirt Friday.

Regina: The next time I met Tom was at dinner at the Peabody Library during Candid Convene in Baltimore.

Tom: We were fortunate to secure a couple of seats because it was the end of a long day. Regina was apparently wearing heels which were not wholly comfortable; fortunately, I had not brought along any uncomfortable heels. We picked up our friendship and I enjoyed the dinner with her. Regina is kind and gracious—willing to give the impression she enjoys my ramblings.

Regina: When I am with Tom, I feel like I am talking to an old friend, and not with someone who was a complete stranger less than a year ago. He’s an extraordinary person, and we truly are blessed to have him as our colleague!

Dave Holmes and Gabe Cohen

Dave Holmes, programs manager, Candid Midwest, and Gabe Cohen, senior director of marketing and communications, are both passionate about helping train our nonprofit partners.

Dave: Gabe was so comfortable working with a large group of
strangers—and so candid in sharing his own stories very effectively in the Profile Update Program for GuideStar Nonprofit Profiles Training.

Gabe: Dave was just so knowledgeable about both trainings and the sector. Even though the specific content of the presentation was new to him, it was easy for him to assist nonprofits with all sorts of different questions they had.

Dave is great at connecting with the people he is talking to. Whether it’s someone on staff like me, or a Funding Information Network partner, or a random nonprofit, his earnest desire to help is clear.

Dave: Gabe is Candid in his entirely straightforward and understandable way of teaching—everyone who came to the trainings he conducted left knowing what Candid really means—that they now can do good better!

Gabe: Two things make Dave Candid. First, he is so incredibly knowledgeable about the sector and the way things work with nonprofits—that expertise is core to who we are as an organization. Second, he is so accessible in the way he goes about his work. He invites conversation and listens to give valuable feedback to whomever he is talking to.

Beth Culp and Wynne Chan

Beth Culp, front-end web developer, and Wynne Chan, planning manager, bonded over saying it like it is, and cats.

Wynne: Beth and I met through the Culture Change & Management Workstream.

Beth: I noticed that Wynne and I both had strong opinions about the importance of transparency in conveying information to staff, and I admired Wynne for boldly sharing her opinions to the group.

Wynne: I, too, noticed that Beth was very outspoken and willing to share her thoughts. It’s not always easy to speak up when it’s a big group of people who don’t know each other well so I admired her for that!
*Beth:* ... and we have a lot of fun chatting on Slack. Wynne is great at juggling many things at once, and she is a terrific planner!

*Wynne:* When I went to Beth’s desk the first time in New York I saw Pusheens on her desk and knew we would get along. We both adore cats and each have a cat. If you ever used any Pusheen emojis in Slack, they probably came from myself or Beth.

**Where are Candid employees located?**

- 27 — Remote
- 3 — Atlanta, GA
- 6 — Cleveland, OH
- 10 — Washington DC
- 11 — Oakland, CA
- 47 — Williamsburg, VA
- 116 — New York, NY

**How long have Candid employees been with us?**

- 111 — 0-5 years
- 34 — 6-10 years
- 38 — 11-15 years
- 17 — 16-20 years
- 15 — 21-25 years
- 3 — 26-30 years
- 2 — 31-35 years
Thank you.

The Dorothy A. Johnson Center for Philanthropy at Grand Valley State University:

“Congratulations to Candid—the new organization formed by the merger of the Foundation Center and GuideStar. Candid will be a powerful source of data on the sector, including both foundations and nonprofits”

Philanthropy Daily:

“This morning the Foundation Center and GuideStar announced that they have joined forces to become a new nonprofit entity named Candid”

Tech Republic:

“Just recently, two powerful entities in the non-profit sector combined forces to create an unprecedented data collaboration. GuideStar and the Foundation Center merged to form Candid”

The Nonprofit Times:

“Two of the two largest data and information nonprofit organizations in the United States announced a merger on February 1. The Foundation Center and GuideStar will become Candid after almost two years of discussions on a merger that has its origins at least a decade in the making”

The Chronicle of Philanthropy:

“The Foundation Center, which has collected information on philanthropy for more than half a century, today announced that it will join forces with GuideStar, an electronic database of about 2.7 million nonprofits, to form a new nonprofit organization known as Candid”

Nonprofit PRO:

“In major news, Foundation Center and GuideStar have announced a merger. The two organizations will form a new nonprofit named
Candid that will aim to connect nonprofit professionals with an unprecedented array of data and research”

**Fast Company:**

“GuideStar and the Foundation Center are merging to form the definitive nonprofit transparency organization”

**Alliance magazine:**

“Foundation Center and GuideStar today announced they have joined forces to become a new nonprofit entity named Candid—a global source of knowledge for the entire social sector”

**Georgia Center for Nonprofits:**

“Early this year, a new force for sector outreach and information came into being. Called Candid, the freshly-minted national resource is the result of a merger between two organizations that have been vital to the sector’s ongoing evolution toward greater transparency and professionalism”