

How-to-Guide: Creating & Update a GuideStar Nonprofit Profile

Process Overview

1. This report should be updated each year to reflect the previous year's stats & updates (could be updated at the start of the calendar or fiscal year, or after annual 990 is submitted)
2. Log in and select Update Nonprofit Profile (along top menu bar)
3. Select Edit (below nonprofit's name & EIN number)
4. There are 4 levels of categories to update (left sidebar): (see [Info Needed at Each Seal Level](#) below)
 - a. Bronze (basic info)
 - b. Silver (financial info)
 - c. Gold (organizational goals)
 - d. Platinum (evaluation metrics)
5. Expand each level to update the necessary information needed to reach Platinum level each year
 - a. Check with webpage manager for the number of webpage views
 - b. Log in to Facebook for the total number of Followers
 - c. Check with Treasurer/Membership Manager/Relevant Board Member to calculate the number of new donors each year
 - d. Check with Secretary/Relevant Board Member for the total number of volunteer hours contributed to the organization
6. Confirm and Publish all changes
7. Once updated, copy the HTML code for the Platinum seal logo (new each year) and send to webpage manager to add to the website donation page. To find HTML Code:
 - a. Once logged in, select Update Nonprofit Profile (along top menu bar)
 - b. Select Benefits (below nonprofit's name & EIN number)
 - c. Scroll down to GuideStar Participation Logo and Widget section

To see an examples of a Platinum-Level nonprofit profile:

- [Friends of Hawaiian Islands NWR](#)
- [Friends of Ottawa National Wildlife Refuge](#)

GuideStar How-To Guides

[GuideStar Help Center](#) has helpful online guides on a myriad of topics that walk you through how to set up and maintain your GuideStar Profile, as well as how to use it as an organization and as a supporter.

Info Needed at Each Seal Level

1. Bronze Level (General Info)

- a. Contact Info
- b. EIN Number
- c. Mission Statement
- d. Subject Areas
- e. Target Population
- f. Leadership Contact Info & Short Bio

2. Silver Level (Programs & Branding)

- a. Current Programs
 - i. Brief Description
 - ii. Target Population
 - iii. Location
- b. Logo
- c. Tagline or Slogan
- d. Social Media Profiles/Handles
- e. Photos/Videos of Organization's Work

3. Gold Level (Financials & Staff)

- a. Financial Statement
- b. Board Members (Names & Organizations) – *NOTE: If organization is not an independently incorporated nonprofit at the State-level, it is not required to have a legal board of directors.*
- c. Staff Members (Contact Info & Compensation)
- d. Leader Demographics - *NOTE: Can opt out of any specific designation for any specific category/person*
 - i. Race/Ethnicity
 - ii. Gender Identity
 - iii. Sexual Orientation
 - iv. Disability Status

4. Platinum Level

- a. Share your strategy & goals
 - i. Upload a strategic plan that applies to this year and was adopted within the past 5 years, OR...
 - ii. Fill out the Charting Impact questions
 1. What is your organization aiming to accomplish?
 2. What are your strategies for making this happen?
 3. What are your organization's capabilities for doing this?
 4. How will your organization know if you are making progress?
 5. What have you accomplished so far and what's next?
- b. Share at least one metric from 2020
 - i. Summarize the problem or need your organization is working to address
 - ii. What is your organization aiming to accomplish? (i.e., describe your organizational goals)

- iii. Sustainable Development Goals & strategies for making this happen
 - iv. Organization's capabilities for meeting your goals
 - v. What have you accomplished so far and what's next? (i.e., describe organization's progress)
- c. Organizational Metrics
 - i. Based on your strategic plan, you are asked to write your own metrics (ways the organization measures its strategic plan progress) and provide the following annual information for each metric:
 - 1. Year(s)
 - 2. Target Populations
 - 3. Does metric relate to a specific program?
 - 4. Optional Notes
 - ii. Examples of strategic plan metrics may include annual markers like the following:
 - 1. Number of meetings held with decision makers
 - 2. Number of individuals attending community events or trainings
 - 3. Number of website pageviews
 - 4. Number of Facebook followers
 - 5. Total dollar amount of grants awarded
 - 6. Number of new donors
 - 7. Total number of volunteer hours contributed to the organization
- d. External Evaluations (optional: any external evaluation(s) supporting your organization's progress or results)

5. Optional/ Additional Sections

- a. Demographics (Board Members & Staff) - *NOTE: Can opt out of any specific designation for any specific category/person*
 - i. Race/Ethnicity
 - ii. Gender Identity
 - iii. Sexual Orientation
 - iv. Disability Status
- b. Equity Strategies (to build a culture of equity and inclusion)
- c. Board Leadership Practices (i.e., does the organization have policies in place for fair and equitable review of the following practices)
 - i. Board Orientation & Education
 - ii. CEO Oversight
 - iii. Ethics & Transparency
 - iv. Board Composition
 - v. Board Performance
- d. How We Listen (i.e., how does the organization collect, respond to, use &/or share feedback from the people it serves)
- e. Additional Documents
 - i. Year Founded/Dissolved
 - ii. IRS 501(c)(3) Letter of Determination
 - iii. Letter of Dissolution (if applicable)
 - iv. Most Recent 990 (before GuideStar gets it from the IRS)
 - v. Awards, External Assessments, Accreditations, or Affiliations (if applicable)

- vi. Strategic Plan (if applicable)
- vii. Notes on the Organization (optional comments you would like to make to the public)
- f. AmazonSmile
 - i. Option to be listed as an eligible charity with [AmazonSmile](#) (Amazon donates 0.5% of the price of eligible purchases if shoppers opt to select your charity)
 - 1. Contact Info
 - 2. EIN Number
 - 3. Mission Statement
 - 4. Year Founded
 - 5. Annual Revenue
 - 6. Subject Areas
 - 7. Target Population
 - 8. Sustainable Development Goals (if applicable)

Benefits of Platinum-Level Seal

1. You Can Choose to:

- a. Allow donors to give to your organization through GuideStar's partners (e.g., Facebook, AmazonSmile, Network for Good, and Salesforce)
- b. Add a Donate Button to your GuideStar Nonprofit Profile

2. Automatic Benefits

- a. Full GuideStar profile view
 - i. You can share your profile PDF in meetings with potential funders
 - ii. Your GuideStar profile visitors can easily access all your current information in one report
- b. GuideStar participation logo and widget
 - i. Place the GuideStar participation logo on your organization's website to promote your ongoing commitment to nonprofit transparency
 - ii. The widget links directly to your report page on GuideStar so
 - iii. Adding the GuideStar Seal of Transparency onto your website via a simple HTML code
- c. Early access to Candid training
 - i. You'll receive e-mail notifications for early access to Candid's nonprofit webinars (e.g., fundraising, nonprofit compensation, efficient marketing, etc.)
 - ii. [Candid Webinar Schedule](#)
- d. Foundation Directory Online ([subscription service](#))
 - i. Grantseekers can use FDO to build robust prospecting lists and prioritize funders based on how much they support your cause
- e. Nonprofit alerts
 - i. You can set up GuideStar to automatically send you e-notifications for a list of specific milestones (i.e., when GuideStar receives a new 990 PDF upload from the IRS, or when GuideStar receives any notice that your organization has been flagged by the IRS)
- f. Outreach tool kit to help promote your organization; includes a draft press release, a sample tweet and Facebook post, a sample newsletter or e-mail article, and participation logo image files.