

# 2020 GuideStar Profile Standard

A best practice guide for collecting and sharing information about nonprofit organizations



## Tips and tricks

- Update your information at least once a year—otherwise your Seal will expire
- We recommend you review all your fields to make sure they're as up to date as possible
- In Silver, the reported data must be from the latest available fiscal year (2019 or 2018)
- In Platinum, at least one metric must be from 2019
- The levels are cumulative—for example, to achieve Platinum requires first fulfilling the requirements for Bronze, Silver, and Gold

## Legend

- Red\*** = required to earn a Seal of Transparency
- Black** = recommended but not required
- \*\*** = information must be latest available (2019 or more recent)

### Seal of Transparency

### Required (\*) and optional information



## Bronze

Provide basic information about your organization so you can be found

<b>Identification Information</b>	<b>Organization Name*</b> <b>Employer Identification Number (EIN)*</b> Telephone Fax <b>Mailing Address*</b>
<b>Additional Names</b>	Also Known As Doing Business As Formerly Known As
<b>Organization Founding</b>	Year Founded Year of Incorporation Letter of Incorporation Letter of Dissolution
<b>Address</b>	Physical Address Mailing Address
<b>International Address</b>	International Address
<b>Payment Information</b>	<b>Legal Name*</b> EIN of Payable Organization <b>Payment Address*</b>
<b>Primary Contact</b>	<b>Name*</b> Title <b>Email*</b> Telephone
<b>Fundraising Contact</b>	Name Title Email Telephone
<b>Organization Leader</b>	<b>Name*</b> Title Email Short Biography Photo LinkedIn URL
<b>Organization Co-leader</b>	Name Title Email Short Biography Photo LinkedIn URL
<b>Other Staff</b>	Type Name Title Email Telephone
<b>Board Chair</b>	<b>Name*</b> Company/Organization Term Dates
<b>Board Members</b>	Name Company/Organization
<b>Mission</b>	<b>Mission Statement*</b>
<b>Programs and Maps</b>	<b>Program Name*</b> <b>Program Description*</b> <b>Population Served*</b> <b>Geographic Area Served*</b>
<b>Categorization</b>	<b>Keywords*</b> <b>NTEE codes*</b> Sustainable Development Goals
<b>Brand</b>	<b>Logo*</b> <b>Tagline*</b> <b>Website URL* (or "Don't have one")</b>



## Silver

Be transparent about your finances so you can build trust

There are two ways to achieve Silver:

**Option A**

**Option B**

<b>A</b>	<b>Audited Financial Statement*</b>	<b>Audited Financial Statement*</b> **Must be 2019 or 2018
<b>B</b>	<b>Fiscal Year*</b>	<b>Fiscal Year*</b> **Must be 2019 or 2018
	<b>Revenue*</b>	<b>Contributions, Gifts, and Grants*</b> Program Service Revenue including Government Fees and Contracts Membership Dues Net Income from Special Events Other Expenses and Amounts <b>Total Revenue*</b>
	<b>Expenses*</b>	<b>Program*</b> <b>Administration*</b> Fundraising Payments to Affiliates Other Expenses and Amounts <b>Total Expenses*</b>
	<b>Assets &amp; Liabilities</b>	<b>Total Assets*</b> <b>Total Liabilities*</b> <b>Net Assets or Fund Balance at the End of the Year*</b>
	<b>Funding Sources</b>	Up to 3 Sources Amounts for Each



## Gold

Share your goals and strategies so you can tell others about your work

<b>Problem Overview</b>	Briefly describe the problem your organization is working to address (max 1,000 char)
<b>Goals</b>	<b>What is your organization aiming to accomplish?*</b> (max 3,000 char)
<b>Strategies</b>	<b>What are your strategies for making this happen?*</b> (max 3,000 char)
<b>Capabilities</b>	<b>What are your organization's capabilities for doing this?*</b> (max 3,000 char)
<b>Indicators</b>	<b>How will your organization know if you are making progress?*</b> (max 3,000 char)
<b>Progress</b>	<b>What have you accomplished so far and what's next?*</b> (max 3,000 char)



## Platinum

Share your quantitative measures of progress and results to show the difference you make

<b>Measures of Progress and Results</b>	Between <b>1** and up to 20 quantitative metrics</b> selected by your organization **At least 1 metric must be from 2019 Assign a <b>Type of Metric</b> (Input, Output, Outcome, Context, or Other) Assign a <b>Direction of Success</b> (Increasing, Decreasing, Holding Steady) Assign a Program or Population Served—as relevant Add a Context Note—as relevant
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Social Media and Outreach		Optional information
Websites	Website Blog URL	
Social Media User Names	Facebook Twitter LinkedIn YouTube Instagram	
Photos and Videos		
Organization Demographics		Optional information
Leader, Board Members, Senior Staff, Staff	Share the number of individuals in your organization according to each category. Report on the following demographic categories: Race & Ethnicity, Gender Identity, Sexual Orientation, and Disability Status  Go to <a href="https://bit.ly/profile-demographics">bit.ly/profile-demographics</a> for Demographic Questions and Best Practices and Definitions	
Equity Strategies	Go to <a href="https://bit.ly/profile-demographics">bit.ly/profile-demographics</a> for Equity Strategies Checklist	
Board Leadership Practices		Optional information
Not Independently Incorporated	Opt-out for organizations not required to have a board	
Board Orientation & Education	Yes/No: Does the board conduct a formal orientation for new board members and require all board members to sign a written agreement regarding their roles, responsibilities, and expectations?	
CEO Oversight	Yes/No: Has the board conducted a formal, written assessment of the chief executive within the past year?	
Ethics & Transparency	Yes/No: Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements within the past year?	
Board Composition	Yes/No: Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?	
Board Performance	Yes/No: Has the board conducted a formal, written self-assessment of its performance within the past three years?	
Feedback Practices		Optional information
Relevance	Yes/No/NA: Does your organization collect feedback (i.e., perceptions, opinions, ideas, concerns) from the people you serve?	
Practices	Multiple choice: How is your organization collecting feedback?	
	Multiple choice: How is your organization using feedback?	
	Text: Please describe a recent change in your organization that resulted from feedback (max 800 char)	
	Multiple choice: With whom does your organization share feedback?	
	Multiple choice: What challenges does your organization face in collecting feedback?	
Resources	Yes/No: Would you be interested in taking a 10-minute organizational quiz, with the answers private only to you, to better understand the maturity level of your feedback practices?	
	Yes/No: Would you like to learn more about applying feedback practices in your organization by reviewing a resource page?	
Additional Documents		Optional information
Annual Report		
IRS Documents	Recent Form 990 Form 990-T Form 1023 or 1024	
Certifications	Affiliation Assessment or Accreditation	
Other Documents		
Notes from the Nonprofit		