

# Candid.

## Candid

### CONTENTS

EIN: 13-1837418  
Report Generated on: 09/10/2021

Executive Summary	2
Programs & Results	4
Financial Review	8
Operations & Leadership	10

### APPENDIX

Key Documents	24
Charity Check Report	25

# Candid

- aka The Foundation Center, Foundation Center, GuideStar, GuideStar USA
- New York, NY
- candid.org
- (212)620-4230

 View GuideStar Profile

# Candid.



## MISSION

Candid gets you the information you need to do good.

## EIN

13-1837418

## PRESIDENT

Bradford Smith

## RULING YEAR

1957

## BOARD CHAIR

T. Sylvester John

## IRS SUBSECTION

501(c)(3) Public Charity

## SUBJECT AREA

Philanthropy

## FOUNDING YEAR

1956

## NTEE Code

Philanthropy / Charity /  
Voluntarism Promotion  
(General) (T50)

## MAIN ADDRESS

32 Old Slip 24th Floor  
New York, NY  
10005

## AFFILIATION TYPE

Independent Organization

## CONTACT

Mary Steyer, Director of  
Communications  
(212) 620-4230  
answers@candid.org

## PROGRAMS

### 1. Knowledge Tools

Population(s) served: General/Unspecified

### 2. Data Tools

Population(s) served: General/Unspecified

### 3. Grantseeker Tools

Population(s) served: General/Unspecified

### 4. Training

Population(s) served: General/Unspecified

## POPULATIONS SERVED

### 1. Age groups

## COMPLIANCE

- ✓ IRS Pub 78 Verified as of August 2021
- ✓ IRS BMF 509(a) (1) as of August 09, 2021
- ✓ A-133 Audit Required/Performed?
- ✓ Conflict of Interest Policy
- ✓ Written whistleblower policy

Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)

## TRANSPARENCY MEASURES

- ✓ Board Practices Reported?
  - ✓ Diversity Data Reported?
- 11** Number of Independent Board Members

# Programs & Results

## PROGRAMS

Source: Self-Reported by Organization, August 2021

### Knowledge Tools

#### **Population(s) Served:** General/Unspecified

Through data, research, and our collective experience, Candid provides our users with the knowledge they need to make strategic decisions and develop practical solutions to achieve their missions.

Our GuideStar searchable database currently includes data on 1.9 million 501c3 entities, making it easier to understand who they are and what they do. We support ongoing learning and research by gathering, indexing, and sharing the sector's collective knowledge on IssueLab while also producing our own research that shares insights on issues affecting the social sector. We provide data and knowledge to the philanthropic field by creating new issue-based web portals known as "Foundation Landscapes" on the topics that matter most to the sector. Through Glasspockets we provide the data, resources, examples, and action steps foundations need to understand the value of transparency, be more open in their own communications, and help shed more light on how private organizations are serving the public good. Candid works closely with organizations around the globe to assist them in collecting and organizing their region's philanthropy data by sharing what we have learned over the past 60 years about data acquisition and data architecture.

Candid's CF Insights program is the leader in data collection and research for the community foundation field in the U.S. with a reputation for benchmarking and analysis of trends. Through CF Insights, we continue to deliver a high level of service to our members and worked with partners to release groundbreaking research on the need for

increased collaboration amongst leaders of community foundations.

We also have a number of blogs across our platforms (including the GuideStar blog, GrantSpace blog, GrantCraft blog, GlassPockets blog, Philanthropy News Digest Blog, and more!) that shine a light on relevant topics and trends affecting the sector.

### Data Tools

#### **Population(s) Served:** General/Unspecified

Candid ensures that nonprofit information is available whenever and wherever it is needed. Through our GuideStar database we share information on 2.8 million current and historic tax exempt organizations. Nonprofits use the tool to showcase their work, find partners for collaboration, and connect with other leaders in the field; donors use it to find nonprofits that champion the causes they care about. Our data feeds into tools used by community foundations, grants management vendors, grantmaking organizations, and philanthropic websites and applications such as Volunteer Match, AmazonSmile, and Facebook.

Foundation Directory Online (FDO) provides subscribers with access to timely, comprehensive information on U.S. grantmakers and their grants, plus a growing number of foundations located outside of the U.S. FDO contains data on 19 million grants and 166,000 grantmakers, and is freely accessible to organizations and community stakeholders at our 400+ FIN partners.

Foundation Maps contains records on more than 16.8 million grants, with innovative ways to visualize funding data, and the flexibility and precision to tailor research. This tool helps funders and nonprofits access the data they need to make strategic decisions and strengthen their impact.

### Grantseeker Tools

#### **Population(s) Served:** General/Unspecified

Each year, hundreds of thousands of people use Candid's searchable database, Foundation Directory Online (FDO), to find supporters and partners to advance their work. FDO, the world's most robust source of foundation and grants data, is available for free use at our 400+ Funding Information Network (FIN) partners. Located at libraries, community foundations, and colleges, our FIN assures public access to our resources across the U.S. and several other countries. By making our subscription services accessible at no cost through our network and providing capacity building services online, we ensure that 99 percent of the people that use our services do so for free. We also provide free introductory trainings in-person and online to help nonprofit professionals learn the skills they need (such as proposal writing, prospect research, etc.) to find funding, enabling them to sustain their programs in the communities they serve.

### Training

#### **Population(s) Served:** General/Unspecified

Candid operates research, education, and training programs designed to advance knowledge about philanthropy at every level, and provided under-resourced nonprofit organizations with the tools they need to better fulfill their missions.

Through Candid Learning, we provide tools and resources to help nonprofits become more viable grant applicants and build sustainable organizations. We offer trainings and special events in-person and online to build capacity in three core competencies: fundraising, organizational sustainability, and leadership and management. These resources help equip nonprofits to better serve their constituents

and tackle critical social issues.

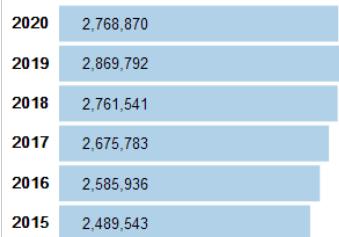
GrantCraft combines the collective wisdom of funders worldwide with Candid's expertise to help funders increase the impact of their funds. GrantCraft delivers the knowledge funders need to be strategic and effective in their work, addressing questions they face across various strategies and issue areas.

We also train nonprofits in-person and online to help them complete their GuideStar nonprofit profiles and showcase their work. Organizations are empowered to tell their stories and explain their impact through programmatic metrics.

## RESULTS

### Number of organizations you can find on GuideStar

#### TOTALS BY YEAR

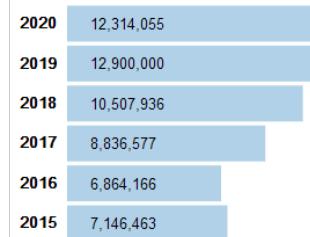


**Population(s) Served:** No target populations selected

**Related program:**

### Number of unique website visitors on GuideStar

#### TOTALS BY YEAR

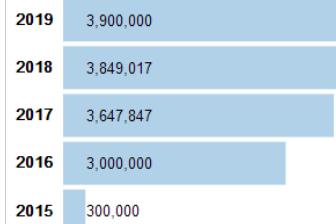


**Population(s) Served:** No target populations selected

**Related program:**

### Number of Grants Coded

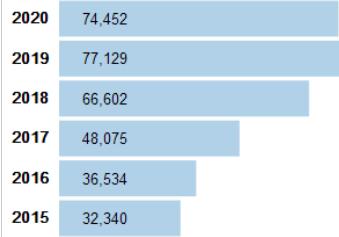
#### TOTALS BY YEAR



**Population(s) Served:** No target populations selected

### Number of organizations who share enough information to earn a Seal of Transparency on GuideStar

#### TOTALS BY YEAR

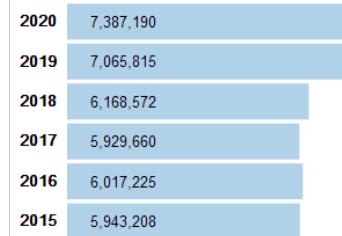


**Population(s) Served:** No target populations selected

**Related program:**

### Number of unique website visitors on all Foundation Center Web Properties, including Candid Learning, GrantCraft, Philanthropy News Digest, and Glasspockets

#### TOTALS BY YEAR



**Population(s) Served:** No target populations selected

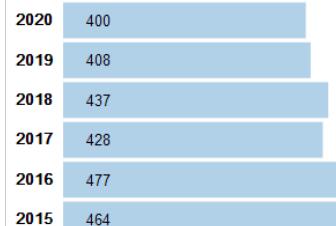
**Population(s) Served:** No target populations selected

**Related program:**

### Number of Funding Information

#### Network Partners

#### TOTALS BY YEAR



**Population(s) Served:** No target populations selected

**Related program:**

[More results from this organization's programs](#)

## CHARTING IMPACT

### What is the organization aiming to accomplish?

Candid provides trusted information, data-driven tools, research, analysis, best practices, and trainings to help the social sector increase its ability to affect change and transform lives. We represent the world's largest repositories of trusted historical and present-day information on nonprofits, foundations, and the capital flows that bind them. We aim to create the future of data, information, and knowledge for the social sector. We will also work to enhance the services we offer to the millions of people who rely on us to help them make the world a better place.

### What are the organization's key strategies for making this happen?

Candid will develop a new generation of products and services that are technologically sophisticated and designed to champion the causes, organizations, and knowledge that power civil society worldwide. We will leverage our shared stores of talent, data, indicators, research, news, and capacity-building resources to improve philanthropic systems and practices in the U.S. and around the world, and will enable knowledge sharing with the potential to transform how civil society and the social sector learns and improves.

As we integrate operations, we will continue the core work of both Foundation Center and GuideStar while using our combined expertise to amplify our impact. We will continue to learn from one another and those we serve to determine how to improve our offerings and provide tools that will help nonprofits, foundations, giving platforms, and other social sector stakeholders achieve their missions.

### What are the organization's capabilities for doing this?

With more than 80 years of collective experience supporting the social sector, Candid has the combined staff expertise, organizational capacity, and leadership to provide new resources and services for those in the social sector and beyond.

We are fortunate to have a staff of 200+ dedicated professionals skilled in building tools and delivering services to nonprofits, foundations, professionals, and individuals; stable financials and a plan for continued sustainability; an engaged board of directors from a wide variety of disciplines; and a large group of committed funders. Our staff leadership has a long track record of expanding our service to the field, often by capitalizing on new technologies. By developing the skills and knowledge base of our staff, we ensure that we can continue to innovate, and effectively identify and meet needs in the sector as they arise.

Candid's combined history of serving nonprofits, grantmakers, researchers, and do-gooders of all kinds provides us with unique insights into the the evolving needs of the social sector. These insights help us shape our offerings and ensure that we keep our finger on the pulse of what our users need to help them do good. We have long held that increasing transparency in our sector would increase its effectiveness, and that democratizing access to data, knowledge, and resources would level the playing field for those working to improve their communities and champion their causes. The combination of a trusted history of providing non-partisan data and knowledge and the ability to create cutting edge technology to propel the social sector forward gives us a unique vantage point from which to serve those who are working to build a better world.

### What have and haven't they accomplished so far?

Candid was formed in 2019 with the integration of Foundation Center and GuideStar. The guiding work and missions of Foundation Center and GuideStar were complementary, and we collaborated over the years on data processing efficiencies, data standards for the social sector, and the development of a registry of unique identification numbers for nonprofits globally. We have helped each other maintain data standards and protect the integrity of the data that we collect. For example, one of our most recent collaborations included building the Basic Registry of Identified Global Entities (BRIDGE). BRIDGE numbers help the social sector discover what other data exists, integrate data systems, and ensure that nonprofits and service organizations are discoverable. Both organizations have made great strides in advancing the social sector, and we look forward to the exciting year that lies ahead.

# Financials

FISCAL YEAR START: 01/01

FISCAL YEAR END: 12/31

✓ Financials audited by an independent accountant

## FINANCIALS QUICK VIEW

Total revenue, gains, and other support per audited financial statements	\$29,075,879
Total expenses and losses per audited financial statements	\$25,916,761
Surpluses in last 5 years	2
Negative Net Assets in past 5 years	0

## Financial Trends Analysis Business Model Indicators

Created in Partnership with



Profitability	2014	2015	2016	2017	2018
Unrestricted surplus (deficit) before depreciation	\$3,382,408	\$4,401,393	\$641,278	\$2,727,203	\$627,973
As a % of expenses	13.9%	16.9%	2.6%	12.2%	2.7%
Unrestricted surplus (deficit) after depreciation	\$2,631,627	\$3,018,797	-\$1,744,229	\$373,438	-\$1,501,740
As a % of expenses	10.5%	11.0%	-6.4%	1.5%	-5.8%
Revenue Composition					
Total revenue (unrestricted & restricted)	\$23,529,334	\$25,393,174	\$24,111,780	\$24,457,151	\$29,706,800
Total revenue, % change over prior year	-22.2%	7.9%	-5.0%	1.4%	21.5%
Program services revenue	58.1%	57.3%	59.3%	59.2%	52.2%
Membership dues	0.0%	0.0%	0.0%	0.0%	0.0%
Investment income	2.1%	2.0%	1.6%	1.6%	0.9%
Government grants	0.0%	0.0%	0.0%	0.0%	0.0%
All other grants and contributions	38.5%	39.5%	36.0%	35.2%	46.6%
Other revenue	1.3%	1.3%	3.0%	4.0%	0.3%
Expense Composition					
Total expenses before depreciation	\$24,387,171	\$26,096,413	\$24,815,096	\$22,362,123	\$23,652,208
Total expenses, % change over prior year	-0.6%	7.0%	-4.9%	-9.9%	5.8%
Personnel	62.0%	61.1%	67.1%	65.7%	71.5%
Professional Fees	10.3%	8.0%	6.7%	6.5%	6.2%
Occupancy	11.1%	13.9%	8.6%	9.9%	8.7%
Interest	0.0%	0.0%	0.1%	0.1%	0.2%
Pass-Through	0.0%	0.0%	0.0%	0.0%	0.0%
All other expenses	16.6%	17.0%	17.5%	17.8%	13.4%

# Financial Trends Analysis, continued

## Moving Toward Full Cost Coverage

Full Cost Components (estimated)	2014	2015	2016	2017	2018
Total Expenses (after depreciation)	\$25,137,952	\$27,479,009	\$27,200,603	\$24,715,888	\$25,781,921
One Month of Savings	\$2,032,264	\$2,174,701	\$2,067,925	\$1,863,510	\$1,971,017
Debt Principal Repayment	\$0	\$0	\$953,623	\$278,117	\$716,511
Fixed Asset Additions	\$3,067,245	\$11,020,270	\$0	\$0	\$0
Total Full Costs (estimated)	\$30,237,461	\$40,673,980	\$30,222,151	\$26,857,515	\$28,469,449

## Capital Structure Indicators

Liquidity	2014	2015	2016	2017	2018
Months of cash	6.5	5.5	5.3	7.3	8.6
Months of cash and investments	14.3	12.5	12.2	16.0	16.4
Months of estimated liquid unrestricted net assets	6.7	3.2	3.3	4.8	4.9
Balance Sheet Composition	2014	2015	2016	2017	2018
Cash	\$13,179,389	\$11,938,961	\$10,955,262	\$13,661,295	\$17,029,202
Investments	\$15,836,545	\$15,157,087	\$14,334,873	\$16,071,297	\$15,286,984
Receivables	\$7,934,418	\$4,372,135	\$3,608,402	\$2,853,965	\$5,000,060
Gross land, buildings, and equipment (LBE)	\$14,823,707	\$21,854,447	\$22,555,320	\$23,062,951	\$23,062,951
Accumulated depreciation (% of LBE)	76.2%	39.7%	48.9%	57.9%	67.1%
Liabilities (as % of assets)	21.8%	35.3%	35.5%	35.3%	32.4%
Unrestricted net assets	\$17,094,780	\$20,113,577	\$18,369,348	\$18,742,786	\$17,241,046
Temporarily restricted net assets	\$13,350,632	\$7,390,299	\$6,348,420	\$7,157,651	\$11,818,509
Permanently restricted net assets	\$1,714,000	\$1,714,000	\$1,714,000	\$1,714,000	\$1,714,000
Total restricted net assets	\$15,064,632	\$9,104,299	\$8,062,420	\$8,871,651	\$13,532,509
Total net assets	\$32,159,412	\$29,217,876	\$26,431,768	\$27,614,437	\$30,773,555

## Key Data Checks

Material Data Errors	2014	2015	2016	2017	2018
	No	No	No	No	No

Note: This issue is relevant to a small number of organizations: The nonprofit subject(s) of this report may have affiliates. The Form 990 data may not include information about any or all potential affiliates. If an organization does have affiliates and these affiliates have substantial financial activity, the financial data in this report may not present a comprehensive picture of the nonprofit's financial condition. Please consult the 990s of any potentially related affiliates for additional information.

- [Formulas for key metrics](#)
- [Key Revenue & Expense Data from Form 990'](#)
- [Key Balance Sheet Data from Form 990'](#)

# Operations

Source: Self-Reported by Organization, August 2021

## PRESIDENT

Mr. Bradford K. Smith

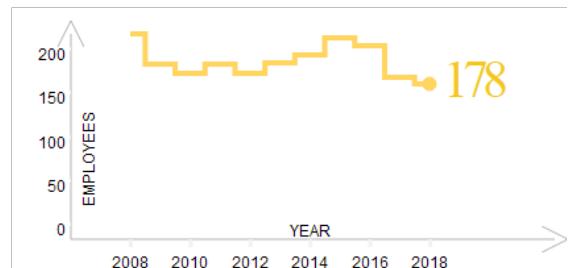
Bradford K. Smith leads Candid as its President. Mr. Smith joined Candid (formerly Foundation Center) as President in October 2008.

Previously, he was president of the Oak Foundation in Geneva, Switzerland. Prior to that, he developed and led Ford Foundation's Peace and Social Justice Program. During his 10-year tenure as vice president, he distributed hundreds of millions of dollars to organizations working on human rights, international cooperation, governance, and civil society in the U.S. and around the world.

Mr. Smith has devoted his entire career to the philanthropic and nonprofit sectors. He serves on the board of directors of the Tinker Foundation and the advisory board of the United Nations Trust Fund for Human Security. He holds an M.A. in economics from the New School for Social Research in New York and a B.A. in anthropology and ethnomusicology from the University of Michigan.

## NUMBER OF EMPLOYEES

Source: IRS Form 990



## BOARD CHAIR

T. Sylvester John

Walmart

Term: 2020 -

## BOARD MEMBERS

Ana Marie Argilagos

HIP-Hispanics in Philanthropy

Melissa Berman

Rockefeller Philanthropy Advisors, Inc.

Stephen Goodall

J.D. Power

Neal Hegarty

Charles Stewart Mott Foundation

Deborah Hoover

The Burton D. Morgan Foundation

Dominick Impeamba

The Rockefeller Foundation

T. Sylvester John

Massmart (Walmart Africa)

Susan Kish

OGCI

Sunand Menon

New Media Insight

Katherina Rosqueta

Center for High Impact Philanthropy, University of Pennsylvania

Brian Trelstad

Bridges Fund Management

Bradford Smith

Candid (President)

Naila Farouky

Arab Foundations Forum

Rosa Gallego

Asociación Española de Fundaciones (AEF; Spanish Association of Foundations)

**Matt Gee**

BrightHive

**Rhett Mabry**

The Duke Endowment

**Jeff Jones**

Bill & Melinda Gates Foundation

**Mosun Layode**

African Philanthropy Forum

**Kami Dar**

Uniti Networks

**Kenneth Jones**

MacArthur Foundation

**Donna Murray-Brown**

Michigan Nonprofit Association

## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2018

Name	Title	Compensation	Other	Related
BRADFORD K SMITH	PRESIDENT	\$629,603	\$60,914	\$0
MONISHA DE QUADROS	TREASURER/VP FINANCIAL STRATEGY	\$236,569	\$16,604	\$0
ZOHRA ZORI	SEC. & VP-SOCIAL SECTOR OUTREACH	\$174,264	\$20,215	\$0
CLOTILDE PEREZ-BODE DEDECKER	CHAIR	\$0	\$0	\$0
NEAL HEGARTY	VICE CHAIR	\$0	\$0	\$0
ANA MARIE ARGILAGOS	TRUSTEE	\$0	\$0	\$0
MELISSA BERMAN	TRUSTEE	\$0	\$0	\$0
JOHN COLBORN	TRUSTEE	\$0	\$0	\$0
PATRICK COLLINS	TRUSTEE (THRU 04/2018)	\$0	\$0	\$0
DEBORAH D HOOVER	TRUSTEE	\$0	\$0	\$0
DOMINICK J IMPEMBA	TRUSTEE	\$0	\$0	\$0
T SYLVESTER JOHN	TRUSTEE	\$0	\$0	\$0
SUSAN KISH	TRUSTEE	\$0	\$0	\$0
EARL LEWIS	TRUSTEE (THRU 08/2018)	\$0	\$0	\$0
PATRICK MCCARTHY	TRUSTEE	\$0	\$0	\$0
VALDEMAR DE OLIVEIRA NETO	TRUSTEE	\$0	\$0	\$0
MARIEKE VAN SCHAIK	TRUSTEE (THRU 08/2018)	\$0	\$0	\$0
YVETTE J ALBERDINGK THIJM	TRUSTEE (THRU 04/2018)	\$0	\$0	\$0

## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2017

Name	Title	Compensation	Other	Related
BRADFORD K SMITH	PRESIDENT	\$603,968	\$57,830	\$0
MONISHA DE QUADROS	VP- FINANCIAL STRATEGY	\$213,338	\$10,721	\$0
LORENA P NOGARA	TREASURER & CONTROLLER (THRU 12/2017)	\$169,891	\$19,726	\$0
ZOHRA ZORI	SEC. & VP-SOCIAL SECTOR OUTREACH	\$160,877	\$30,825	\$0
P RUSSELL HARDIN	CHAIR (THRU 04/2017)	\$0	\$0	\$0
CLOTILDE PEREZ-BODE DEDECKER	CHAIR	\$0	\$0	\$0
NEAL HEGARTY	VICE CHAIR	\$0	\$0	\$0
ANA MARIE ARGILAGOS	TRUSTEE	\$0	\$0	\$0
MELISSA BERMAN	TRUSTEE	\$0	\$0	\$0
GAIL CHRISTOPHER	TRUSTEE (THRU 06/2017)	\$0	\$0	\$0
JOHN COLBORN	TRUSTEE	\$0	\$0	\$0
PATRICK COLLINS	TRUSTEE	\$0	\$0	\$0
DEBORAH D HOOVER	TRUSTEE	\$0	\$0	\$0
DOMINICK J IMPEMBA	TRUSTEE	\$0	\$0	\$0
T SYLVESTER JOHN	TRUSTEE	\$0	\$0	\$0
SUSAN KISH	TRUSTEE	\$0	\$0	\$0
EARL LEWIS	TRUSTEE	\$0	\$0	\$0
PATRICK MCCARTHY	TRUSTEE	\$0	\$0	\$0
VALDEMAR DE OLIVEIRA NETO	TRUSTEE	\$0	\$0	\$0
MARIEKE VAN SCHAIK	TRUSTEE	\$0	\$0	\$0
YVETTE J ALBERDINGK THIJM	TRUSTEE	\$0	\$0	\$0

## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2016

Name	Title	Compensation	Other	Related
BRADFORD K SMITH	PRESIDENT	\$605,457	\$55,897	\$0
LAWRENCE T MCGILL	VP- KNOWLEDGE SERVICES	\$211,513	\$58,585	\$0
JACOB K GARCIA	VP- DATA AND TECHNOLOGY	\$195,860	\$35,658	\$0
LISA L PHILP	VP- SENIOR ADVISOR	\$193,830	\$25,499	\$0
LORENA P NOGARA	TREASURER & CONTROLLER	\$162,632	\$20,559	\$0
ZOHRA ZORI	SEC. & VP-SOCIAL SECTOR OUTREACH	\$157,731	\$28,752	\$0
MONISHA DE QUADROS	VP- FINANCIAL STRATEGY	\$36,714	\$1,603	\$0
P RUSSELL HARDIN	CHAIR	\$0	\$0	\$0
CLOTILDE PEREZ-BODE DEDECKER	VICE CHAIR	\$0	\$0	\$0
JOHN COLBORN	TRUSTEE	\$0	\$0	\$0
PATRICK COLLINS	TRUSTEE	\$0	\$0	\$0
NEAL HEGARTY	TRUSTEE	\$0	\$0	\$0
GAIL CHRISTOPHER	TRUSTEE	\$0	\$0	\$0
DEBORAH D HOOVER	TRUSTEE	\$0	\$0	\$0
DOMINICK J IMPEMBA	TRUSTEE	\$0	\$0	\$0
SUSAN KISH	TRUSTEE	\$0	\$0	\$0
PATRICK MCCARTHY	TRUSTEE	\$0	\$0	\$0
VALDEMAR DE OLIVEIRA NETO	TRUSTEE	\$0	\$0	\$0
MARCIA A SMITH	TRUSTEE UNTIL MARCH 2016	\$0	\$0	\$0
T SYLVESTER JOHN	TRUSTEE	\$0	\$0	\$0
MELISSA BERMAN	TRUSTEE	\$0	\$0	\$0
ANA MARIE ARGILAGOS	TRUSTEE	\$0	\$0	\$0
YVETTE J ALBERDINGK THIJM	TRUSTEE	\$0	\$0	\$0
EARL LEWIS	TRUSTEE	\$0	\$0	\$0
MARIEKE VAN SCHAIK	TRUSTEE	\$0	\$0	\$0

**OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

FISCAL YEAR 2015

Name	Title	Compensation	Other	Related
BRADFORD K SMITH	PRESIDENT	\$605,362	\$58,164	\$0
LISA L PHILP	SEC(THRU 11/15) & VP-STRGC PHI	\$234,500	\$33,418	\$0
LORENA NOGARA	TREASURER & CONTROLLER	\$156,217	\$20,212	\$0
ZOHRA ZORI	SECRETARY & VP SOCIAL SECTOR	\$152,580	\$10,227	\$0
P RUSSELL HARDIN	CHAIRMAN	\$0	\$0	\$0
CLOTILDE PEREZ-BODE DEDECKER	VICE CHAIRMAN	\$0	\$0	\$0
ANA MARIE ARGILAGOS	TRUSTEE	\$0	\$0	\$0
MELISSA BERMAN	TRUSTEE	\$0	\$0	\$0
GAIL CHRISTOPHER	TRUSTEE	\$0	\$0	\$0
JOHN COLBORN	TRUSTEE	\$0	\$0	\$0
PATRICK COLLINS	TRUSTEE	\$0	\$0	\$0
NEAL HEGARTY	TRUSTEE	\$0	\$0	\$0
DEBORAH D HOOVER	TRUSTEE	\$0	\$0	\$0
DOMINICK J IMPEMBA	TRUSTEE	\$0	\$0	\$0
SUSAN KISH	TRUSTEE	\$0	\$0	\$0
EARL LEWIS	TRUSTEE	\$0	\$0	\$0
PATRICK MCCARTHY	TRUSTEE	\$0	\$0	\$0
VALDEMAR DE OLIVEIRA NETO	TRUSTEE	\$0	\$0	\$0
MARCIA A SMITH	TRUSTEE	\$0	\$0	\$0
YVETTE J ALBERDINGK THIJM	TRUSTEE	\$0	\$0	\$0
MARIEKE VAN SCHAIK	TRUSTEE	\$0	\$0	\$0

## OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

FISCAL YEAR 2014

Name	Title	Compensation	Other	Related
BRADFORD K SMITH	PRESIDENT	\$588,094	\$52,381	\$0
LISA L PHILP	SECRETARY & VP STRATEGIC PHIL	\$226,863	\$30,558	\$0
LORENA NOGARA	TREASURER & CONTROLLER	\$156,254	\$19,165	\$0
P RUSSELL HARDIN	CHAIRMAN	\$0	\$0	\$0
CLOTILDE PEREZ-BODE DEDECKER	VICE CHAIRMAN	\$0	\$0	\$0
JOHN COLBORN	TRUSTEE	\$0	\$0	\$0
PATRICK COLLINS	TRUSTEE	\$0	\$0	\$0
NEAL HEGARTY	TRUSTEE	\$0	\$0	\$0
MICHAEL F HAYES	TRUSTEE UNTIL MARCH 2014	\$0	\$0	\$0
DEBORAH D HOOVER	TRUSTEE	\$0	\$0	\$0
DOMINICK J IMPEMBA	TRUSTEE	\$0	\$0	\$0
SUSAN KISH	TRUSTEE	\$0	\$0	\$0
PATRICK MCCARTHY	TRUSTEE	\$0	\$0	\$0
VALDEMAR DE OLIVEIRA NETO	TRUSTEE	\$0	\$0	\$0
MARCIA A SMITH	TRUSTEE	\$0	\$0	\$0
MAUREEN H SMYTH	TRUSTEE UNTIL MARCH 2014	\$0	\$0	\$0
BARRON M TENNY	TRUSTEE UNTIL MARCH 2014	\$0	\$0	\$0
YVETTE J ALBERDINGK THIJM	TRUSTEE	\$0	\$0	\$0

## HIGHEST PAID EMPLOYEES

FISCAL YEAR 2018

Name	Title	Compensation	Other	Related
JACOB K GARCIA	VP- DATA AND TECHNOLOGY	\$240,038	\$44,100	\$0
LAWRENCE T MCGILL	VP- KNOWLEDGE SERVICES	\$229,375	\$66,703	\$0
TRACY L WAKSLER	DIRECTOR OF SUBSCRIPTION PRODUCTS	\$212,841	\$45,853	\$0
LISA L PHILP	VP- SENIOR ADVISOR	\$205,628	\$27,245	\$0
KEVIN L MULDER	DIRECTOR OF TECHNOLOGY INTEGRATION	\$195,141	\$27,430	\$0

## HIGHEST PAID EMPLOYEES

FISCAL YEAR 2017

Name	Title	Compensation	Other	Related
LAWRENCE T MCGILL	VP- KNOWLEDGE SERVICES	\$223,382	\$61,258	\$0
JACOB K GARCIA	VP- DATA AND TECHNOLOGY	\$208,087	\$37,900	\$0
LISA L PHILP	VP- SENIOR ADVISOR	\$199,643	\$26,485	\$0
KEVIN L MULDER	DIRECTOR OF TECHNOLOGY INTEGRATION	\$183,266	\$21,168	\$0
TRACY L WAKSLER	DIRECTOR OF SUBSCRIPTION PRODUCTS	\$180,304	\$39,905	\$0

## HIGHEST PAID EMPLOYEES

FISCAL YEAR 2016

Name	Title	Compensation	Other	Related
ROBERT J YAEGER	VP- FINANCIAL STRATEGY THRU MAY 2016	\$213,586	\$19,830	\$0
JEFFREY A FALKENSTEIN	VP- DATA ACQUISITION THRU FEB. 2016	\$207,974	\$7,686	\$0
ELIZABETH A BRADLEY DIRECTOR OF	BUS DEV, MKTG AND COM THRU OCT. 2016	\$186,709	\$33,603	\$0
EDWARD J VENTURI	VP- INFORMATION TECH. THRU FEB. 2016	\$184,482	\$7,648	\$0
RAWAA NANCY ALBILAL	VP- DEVELOPMENT	\$167,222	\$23,437	\$0

## HIGHEST PAID EMPLOYEES

FISCAL YEAR 2015

Name	Title	Compensation	Other	Related
ROBERT J YAEGER	VP- FINANCIAL STRATEGY	\$241,922	\$38,567	\$0
LAWRENCE T MCGILL	VP- RESEARCH	\$199,713	\$61,037	\$0
ELIZABETH A BRADLEY	DIR. OF BUS DEV, MKTG & COMM	\$184,919	\$30,324	\$0
JACOB K GARCIA	VP- DATA AND TECHNOLOGY	\$183,485	\$34,482	\$0
JEFFREY A FALKENSTEIN	VP- DATA ACQUISITION	\$173,011	\$57,056	\$0

## HIGHEST PAID EMPLOYEES

FISCAL YEAR 2014

Name	Title	Compensation	Other	Related
ROBERT J YAEGER	VP - FINANCIAL STRATEGY	\$226,217	\$14,409	\$0
LAWRENCE T MCGILL	VP - RESEARCH	\$195,627	\$51,887	\$0
TUSHAR DESHPANDE	VP - DATA AND TECHNOLOGY STRAT	\$184,376	\$12,520	\$0
JEFFREY A FALKENSTEIN	VP - DATA ACQUISITION	\$169,995	\$48,067	\$0
EDWARD J VENTURI	VP - INFORMATION TECH	\$168,436	\$47,754	\$0

## Contractors

FISCAL YEAR 2018

Name	Address	Type of Service	Compensation
PATTERSON BELKNAP WEBB & TYLER LLP	1133 AVENUE OF THE AMERICAS, NEW YORK 10036	LEGAL	\$344,045
BEACONFIRE CONSULTING INC	2300 CLARENDRON BLVD SUITE 925, ARLINGTON 22201	IT CONSULTING	\$338,572
SCOTT STOWELL DBA OPEN	180 VARICK STREET ROOM 822, NEW YORK 10014	BRAND CONSULTING	\$150,000

## Contractors

FISCAL YEAR 2017

Name	Address	Type of Service	Compensation
BEACONFIRE CONSULTING INC	2300 CLARENDRON BLVD SUITE 925, ARLINGTON 22201	IT CONSULTING	\$320,367
COMMONFUND	15 OLD DANBURY ROAD PO BOX 812, WILTON 068970812	INVESTMENT SERVICES	\$181,678
CONTEGRA SYSTEMS INC	200 MAMARONECK AVENUE, WHITE PLAINS 10601	IT CONSULTING	\$130,528
PKF O'CONNOR DAVIES LLP	500 MAMARONECK AVENUE SUITE 301, HARRISON 10528	ACCOUNTING	\$113,595

## Contractors

FISCAL YEAR 2016

Name	Address	Type of Service	Compensation
BEACONFIRE CONSULTING INC	2300 CLARENDRON BLVD SUITE 925, ARLINGTON 22201	IT CONSULTING	\$493,657
SLALOM LLC	PO BOX 101416, PASADENA 911891416	IT CONSULTING	\$269,014
ROOFTOP PARTNERS LLC	101 BELLAIR DR, DOBBS FERRY 10522	COMMUNICATION AND MARKETING CONSULTING	\$164,999
COMMONFUND	15 OLD DANBURY ROAD PO BOX 812, WILTON 068970812	INVESTMENT SERVICES	\$164,496
CONTEGRA SYSTEMS INC	200 MAMARONECK AVENUE, WHITE PLAINS 10601	IT CONSULTING	\$154,572

## Paid Preparers

FISCAL YEAR 2018

Firm Name	Firm EIN	Firm Address	Firm Phone
PKF O'CONNOR DAVIES LLP	27-1728945	500 MAMARONECK AVENUE, HARRISON NY 105281633 USA	914-381-8900

## Paid Preparers

FISCAL YEAR 2017

Firm Name	Firm EIN	Firm Address	Firm Phone
PKF O'CONNOR DAVIES LLP	27-1728945	500 MAMARONECK AVENUE, HARRISON NY 105281633 USA	914-381-8900

## Paid Preparers

FISCAL YEAR 2016

Firm Name	Firm EIN	Firm Address	Firm Phone
PKF O'CONNOR DAVIES LLP	27-1728945	500 MAMARONECK AVENUE, HARRISON NY 105281633 USA	914-381-8900

## BOARD LEADERSHIP PRACTICES

GuideStar worked with BoardSource, the national leader in nonprofit board leadership and governance, to create this section, which enables organizations and donors to transparently share information about essential board leadership practices.

---

### BOARD ORIENTATION & EDUCATION

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?

Yes

---

### CEO OVERSIGHT

Has the board conducted a formal, written assessment of the chief executive within the past year?

Yes

---

### ETHICS & TRANSPARENCY

Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements in the past year?

Yes

---

### BOARD COMPOSITION

Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?

Yes

---

### BOARD PERFORMANCE

Has the board conducted a formal, written self-assessment of its performance within the past three years?

Yes

## Organizational Demographics

Who works and leads organizations that serve our diverse communities? This organization has voluntarily shared information to answer this important question and to support sector-wide learning. GuideStar partnered on this section with CHANGE Philanthropy and Equity in the Center.

### Leadership

*The organization's leader identifies as:*

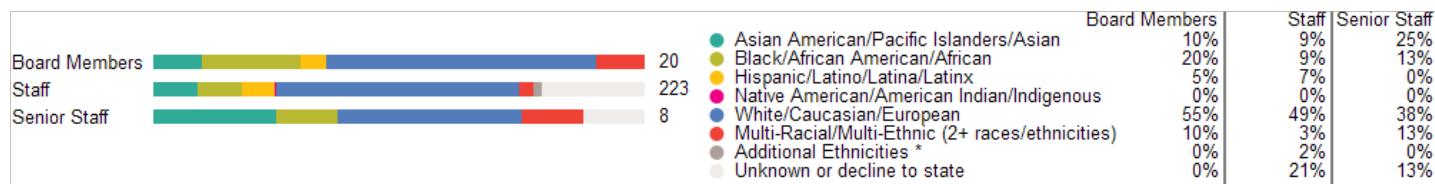
**Race & Ethnicity** White/Caucasian/European

**Gender Identity** Male, Not transgender (cisgender)

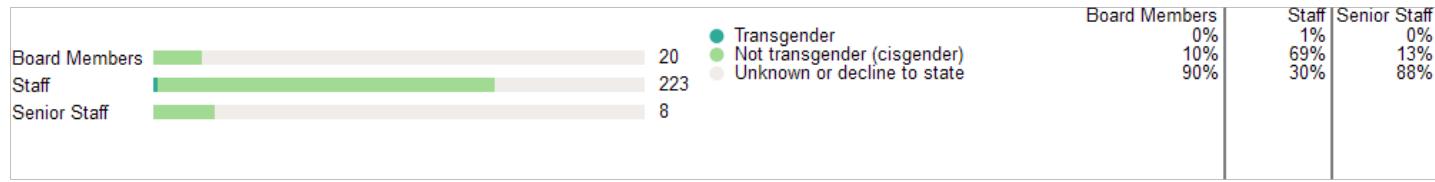
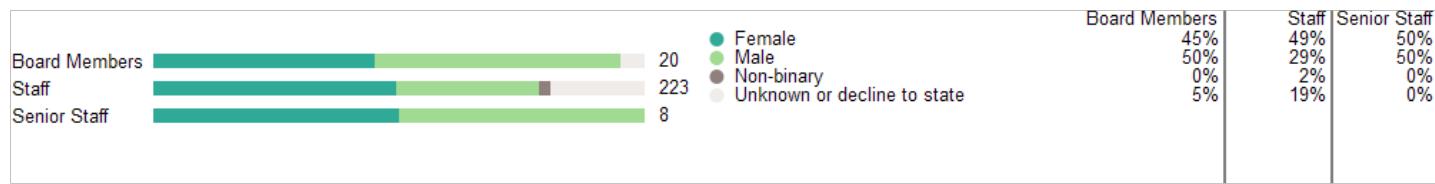
**Sexual Orientation** Decline to state

**Disability Status** Decline to state

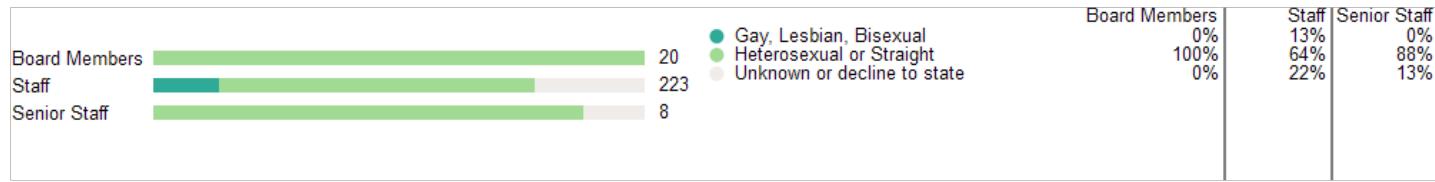
### Race & Ethnicity



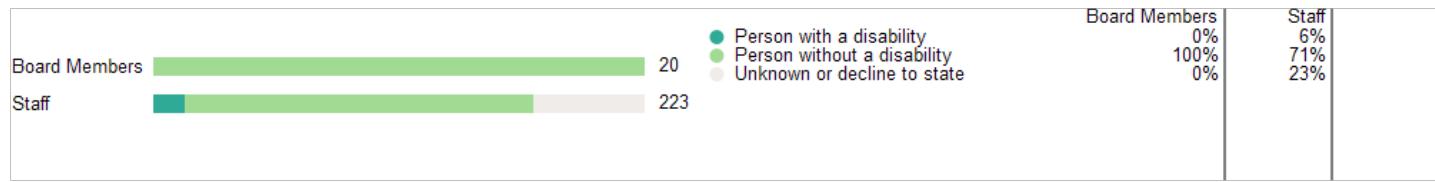
### Gender Identity



### Sexual Orientation



### Disability



**Equity Strategies** *Last Updated: 07/16/2020*

Candid partnered with Equity in the Center - a project that works to shift mindsets, practices, and systems within the social sector to increase racial equity - to create this section. [Learn More](#)

**Data**

- ✓ We review compensation data across the organization (and by staff levels) to identify disparities by race.
- ✓ We employ non-traditional ways of gathering feedback on programs and trainings, which may include interviews, roundtables, and external reviews with/by community stakeholders.

**Policies and processes**

- ✓ We seek individuals from various race backgrounds for board and executive director/CEO positions within our organization.
- ✓ We help senior leadership understand how to be inclusive leaders with learning approaches that emphasize reflection, iteration, and adaptability.

# Appendix

## Key Documents

IRS Forms 990	<input type="checkbox"/> <a href="#">2018 990</a> <input type="checkbox"/> <a href="#">2017 990</a> <input type="checkbox"/> <a href="#">2016 990</a> <input type="checkbox"/> <a href="#">2015 990</a> <input type="checkbox"/> <a href="#">2014 990</a>
IRS Forms 990T	<input type="checkbox"/> <a href="#">2018 990T</a> <input type="checkbox"/> <a href="#">2017 990T</a> <input type="checkbox"/> <a href="#">2016 990T</a> <input type="checkbox"/> <a href="#">2015 990T</a> <input type="checkbox"/> <a href="#">2014 990T</a>
Audited Financial Statements	<input type="checkbox"/> <a href="#">2019 Audited Financial Statement</a> <input type="checkbox"/> <a href="#">2018 Audited Financial Statement</a> <input type="checkbox"/> <a href="#">2017 Audited Financial Statement</a>
Key Organization Documents	<input type="checkbox"/> <a href="#">Letter of Determination</a> <input type="checkbox"/> <a href="#">2020 Annual Report</a> <input type="checkbox"/> <a href="#">2019 Annual Report</a> <input type="checkbox"/> <a href="#">2018 Annual Report</a> <input type="checkbox"/> <a href="#">2017 Annual Report</a> <input type="checkbox"/> <a href="#">2016 Annual Report</a> <input type="checkbox"/> <a href="#">'Key Revenue &amp; Expense Data from Form 990'</a> <input type="checkbox"/> <a href="#">'Key Balance Sheet Data from Form 990'</a>

# GuideStar Charity Check

## Candid

Aka The Foundation Center, Foundation Center, GuideStar, GuideStar USA

32 Old Slip 24th Floor  
New York, NY 10005

- ✓ Foundation Status Code: PC\*
- ✓ Public charity described in section 509(a)(1) or (2)

## IRS Publication 78 Details



Organization name	Location	Most recent IRS Publication 78
Candid	New York, NY	August 2021
EIN	<u>Deductibility status description</u>	Verified with most recent Internal Revenue Bulletin
13-1837418	A public charity (50% deductibility limitation).	September 07, 2021

## IRS Business Master File Details



Organization name	Most recent IRS BMF	Reason for Non-Private Foundation Status
CANDID	August 09 2021	Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi)
EIN	IRS subsection	Ruling date
13-1837418	This organization is a <u>501(c)(3) Public Charity</u>	06/1957

This organization was not included in the Office of Foreign Assets Control Specially Designated Nationals (SDN) list.

On September 8, 2011, the IRS issued [regulations](#) which eliminated the advance ruling process for a section 501(c)(3) organization. [Learn more](#)

\* The Foundation Status Code is the code that foundations are required to provide for each grantee annually on part XV of Form 990PF. Note that this code cannot be derived in some cases (e.g., supporting organizations for which 'type' can't be determined).

[IRS Revenue Procedure 2011-33](#) allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

## GuideStar Charity Check Data Sources

-GuideStar acquires all IRS data directly from the Internal Revenue Service.

-[IRS Publication 78 \(Cumulative List of Organizations\)](#) lists organizations that have been recognized by the Internal Revenue Service as eligible to receive tax-deductible contributions.

-The [IRS Internal Revenue Bulletin](#) (IRB) lists changes in charitable status since the last Publication 78 release. Between the release of IRS Publication 78 and the subsequent IRS Internal Revenue Bulletin, the IRB date will reflect the most recent release date of IRS Publication 78.

-The [IRS Business Master File](#) lists approximately 1.7 million nonprofits registered with the IRS as tax-exempt organizations.

-The [IRS Automatic Revocation of Exemption List](#) contains organizations that have had their federal tax-exempt status automatically revoked for failing to file an annual return or notice with the IRS for three consecutive years.

-The Foundation Status Code is a value derived by mapping the codes found on the [990PF filing instructions](#) to the corresponding codes in the IRS BMF. Note that not all codes are able to be mapped due to insufficient data.

-The Office of Foreign Assets Control (OFAC) [Specially Designated Nationals \(SDN\) list](#) organizations that are owned or controlled by targeted individuals, groups, and entities, such as terrorists or narcotics traffickers. Their assets are blocked and U.S. persons are generally prohibited from dealing with them.