

Philanthropy Southwest: Community and Health Foundations Convening

# What's Data Got to Do with It? Leveraging Candid to Reduce Duplication and Strengthen Relationships

Asia Hadley  
Director of Partnerships  
Candid

Elizabeth Tabita  
Grantmaking Effectiveness Manager  
The California Endowment

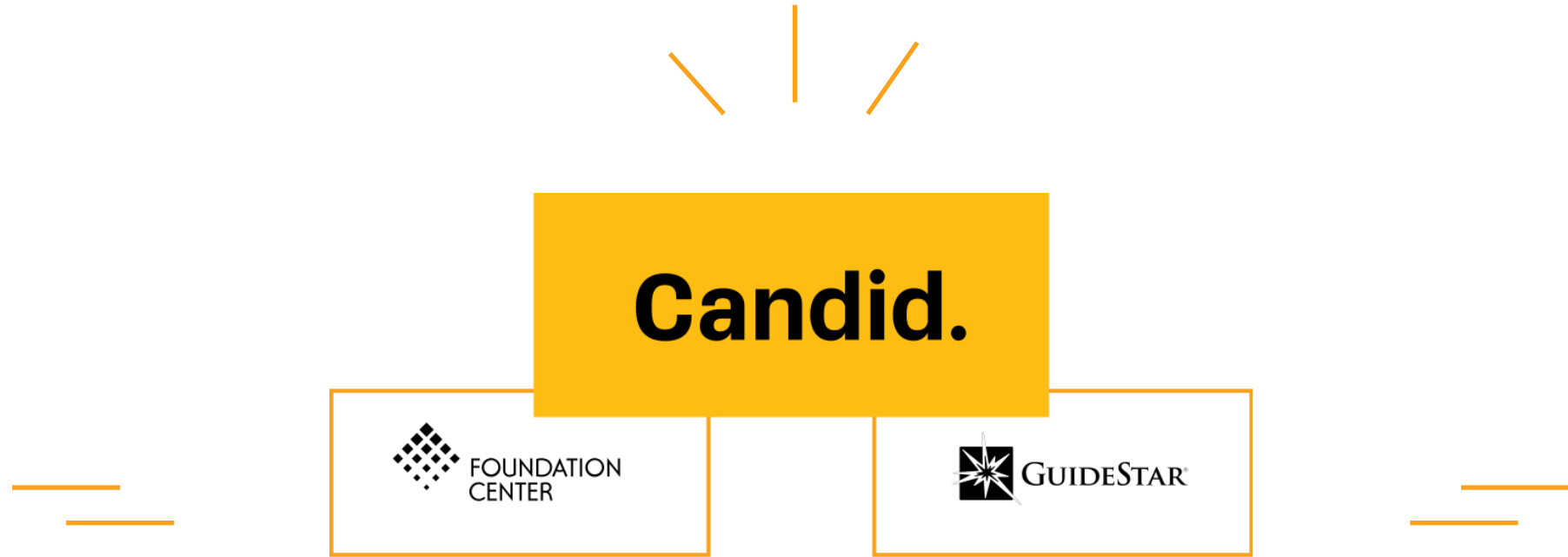
Gillian Knight  
Program Manager Learning and Evaluation  
Healthy Communities Foundation

# 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. We get you the information you need to do good.



You probably know us  
already.



Together, we do so much more.

# Candid search

Nonprofit and grants data you can't get anywhere else

## Easier access

One login unlocks **Foundation Directory** and **GuideStar** data presented together.

## Next generation capability

Dashboards personalized with funder recommendations and generative AI tools to assist those seeking funding.

## Not just more data

Know who provides funding to whom with the most current and comprehensive data available.

## New profile editor

Seals of Transparency showcasing an organization's work are now easier to earn and share in the new and improved experience.

The image shows a screenshot of the Candid search interface. At the top, there's a search bar with the word "Candid." next to it. Below the search bar, there are several search results, each represented by a yellow square icon and a list of details. In the foreground, a detailed profile view is shown, featuring a "Funder" section with a value of "\$80,000" and a "Recipient" section with a radio button and the text "Cash grants". Below these, there are sections for "Grant duration: 2024" and "Support strategies: General support". To the right of the profile view, there is a "Seals of Transparency" badge, which is a stack of four colored boxes (Bronze, Gold, Silver, Platinum) representing different levels of transparency. The background of the interface is a light gray with a network-like pattern of dots and lines.

# Candid & Sector Advocacy

# Candid data can help us understand what is really happening in the sector

Data can help those defending our sector

Data can dispel misinformation with solid facts

Data can be used as early warning signals

# Candid data as the backbone for advocacy in defense of the sector



Council on  
Foundations

Independent  
Sector

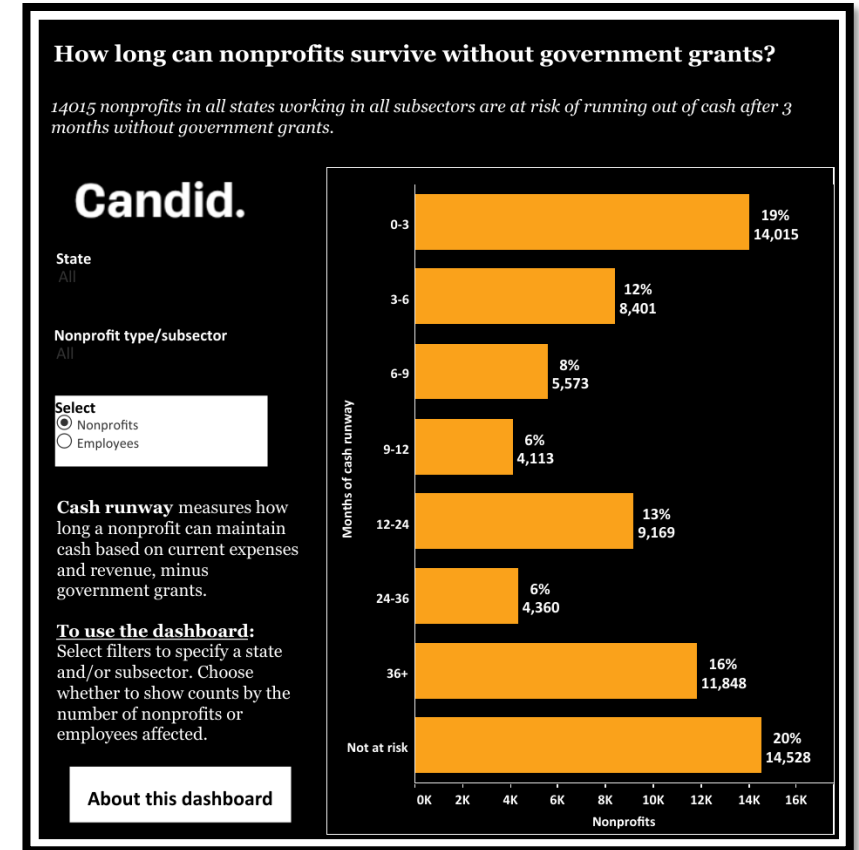
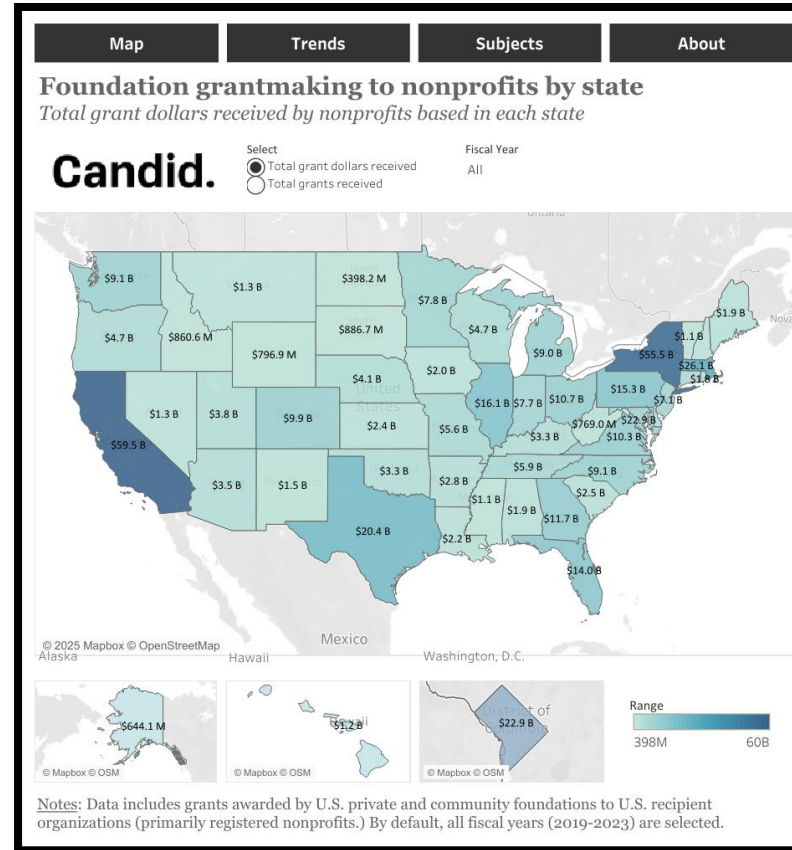
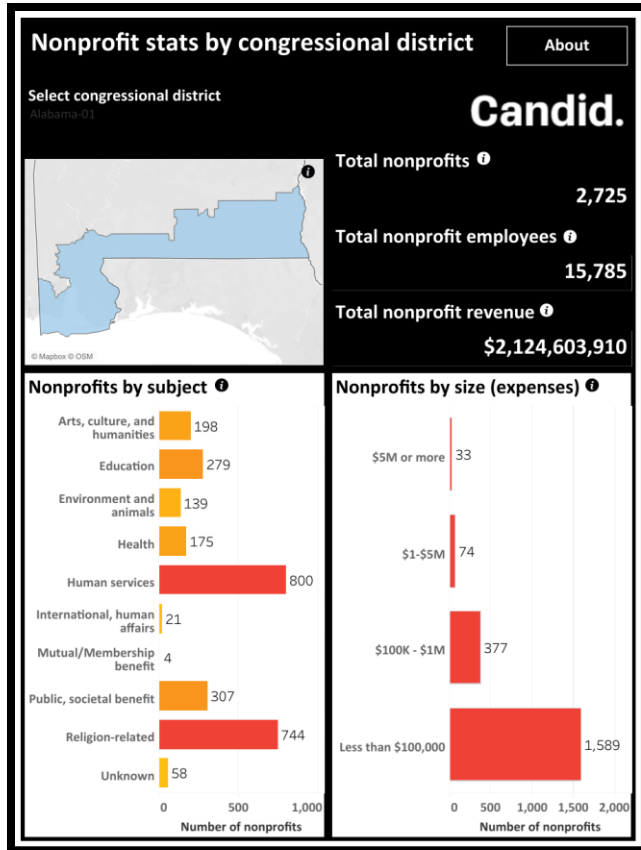


National  
Council of  
**Nonprofits**



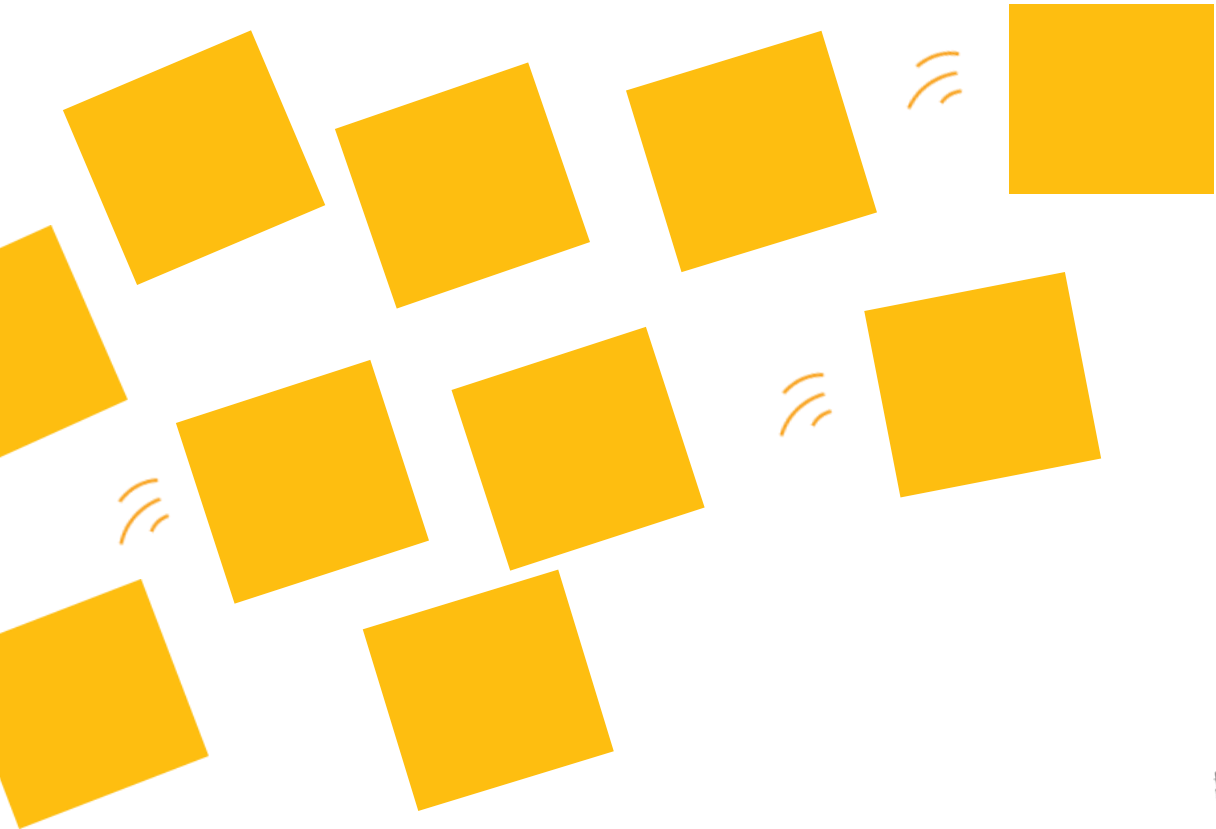
UNITED PHILANTHROPY  
**FORUM**

# Creating free Tableau Public dashboards

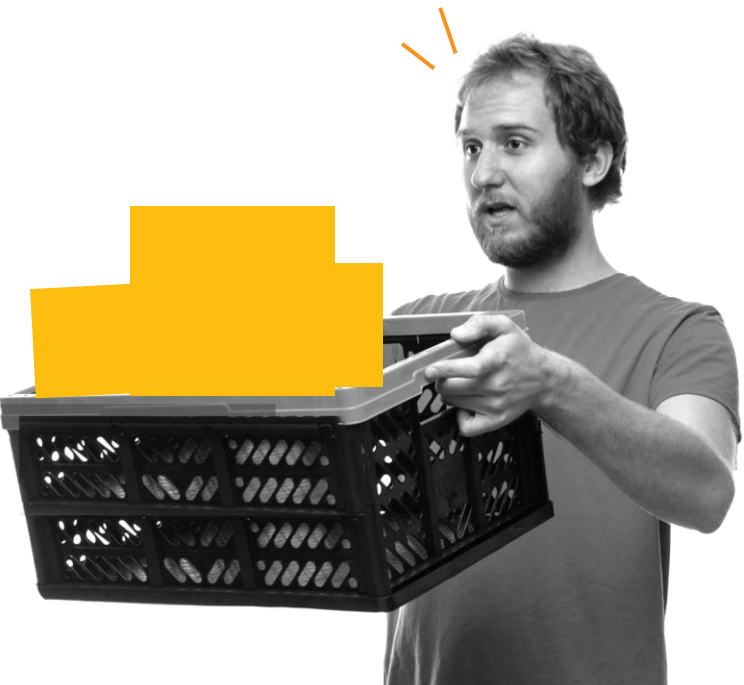


<https://public.tableau.com/app/profile/candid.data.services/vizzes>

# How we got here



Demographic data requests



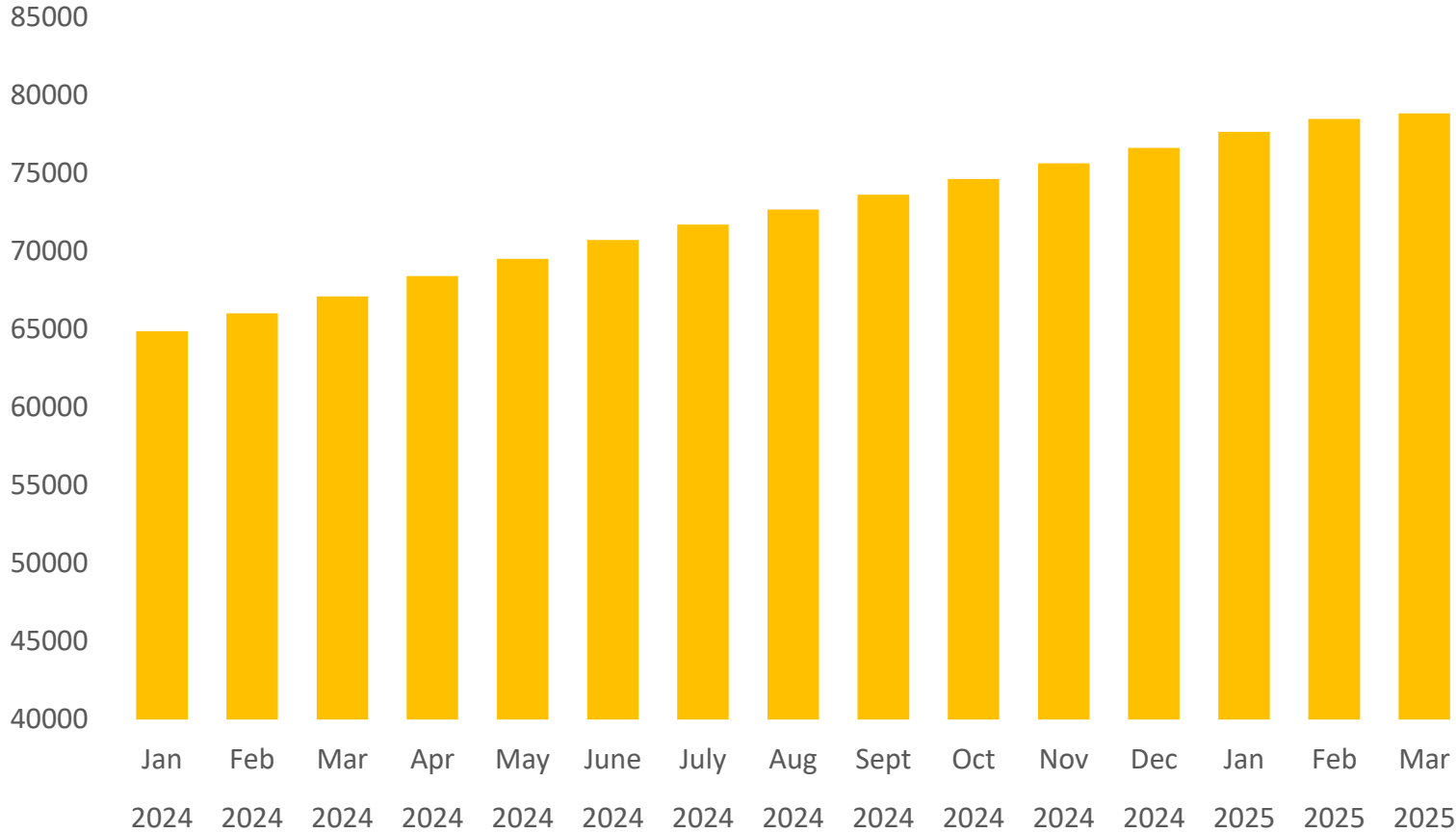
Nonprofit capacity

# Demographics via Candid

- Builds on what exists: Candid nonprofit profile.
- Nonprofits share demographic data, one time, in a standardized format.
- Demographic data freely available.
- Provides support to help nonprofits participate.



# Since DvC launched, *one thousand new nonprofits* have shared demographic data *each month*



Over 78,800 nonprofits have shared data.

# Benefits to the sector

---

Aggregate data for full view of equity across the sector.

---

Benchmark, identify gaps, and track progress.

---

Find nonprofits reflective of communities served.

---

Nonprofits share data just one time.



# What demographic data is collected?

Leader

Does your organization's leader publicly self-identify as:

---

**Race & Ethnicity**

- Asian/Asian American
- Black/African American
- Hispanic/Latino/Latina/Latinx
- Middle Eastern/North African
- Native American/American Indian/Alaska Native/Indigenous
- Native Hawaiian/Pacific Islander
- White/Caucasian/European
- Multi-Racial/Multi-Ethnic (2+ races/ethnicities)
- Decline to state
- People who identify with another race or ethnicity (please specify)

We do not collect race & ethnicity information about the leader

Gender Identity

How many Board Members publicly self-identify as the following:

Female	<input type="text" value="8"/>
Male	<input type="text" value="7"/>
Non-binary ⓘ	<input type="text"/>
Decline to state	<input type="text" value="1"/>
Unknown	<input type="text" value="1"/>

DO YOUR TOTALS ADD UP? 17 out of 17 Gender Identity ✓

# Access the demographic data for free



Candid nonprofit profiles

Demographics API

Grants management systems

Nonprofit demographics connector

Tableau dashboard

Downloadable spreadsheet

# What it means to be a partner

Retrieve demographic data directly from Candid for free

Limit the use of custom formats

Ask nonprofits to share their data via their Candid profile



# Grants management system partners



# Over 190 partners and counting

Funders

Nonprofit associations



Grants management systems

Philanthropy serving organizations

[Full partner list at candid.org/dvc](https://candid.org/dvc)

Community Centric:  
Collaborating with  
community partners and  
the broader field of  
philanthropy helps build  
strong and lasting bridges.

Elizabeth Tabita, MPA  
Grantmaking Effectiveness  
Manager



# Overview



[www.calendow.org](http://www.calendow.org)



Demographic  
Data Collection  
with Candid



CA  
Collaborative  
Project



Q&A

# Mission

To expand access to affordable, quality health care for underserved individuals and communities and to promote fundamental improvements in the health status of all Californians.



# General Operating Support Data Collection Overview

## Categories



Geographic Area Served



Population Density



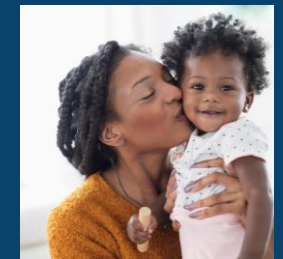
Age Group



Race/Ethnicity/  
Culture of Origin



Gender Identity



Sexual Orientation

# General Operating Support

Funding Priorities

Award Year 2025

289 Awards

\$135,992,042



**Power  
Infrastructure**



**Health  
Coverage &  
Access**



**Resilient  
Communities**



**Justice  
Reinvestment**


# Demographic Data Specifics

Demographic Data in GMS from Candid.

- \*Organization Leader
- \*Board Race/Ethnicity
- \*Board Gender Identity
- \*Board Sexual Orientation
- \*Board Ability/Disability

## Update Demographic Data in GMS

Click here to refresh your organization's profile with demographic data from Candid/GuideStar.

 Update Demographic Data in GMS

### Org Leader

Leader's Gender Identity: Male ?	Leader's Gender Identity 2: ?
Co-leader's Gender Identity: ?	Co-leader's Gender Identity 2: ?
Leader's Sexual Orientation: ?	Co-leader's Sexual Orientation: ?
Leader's Disability Status: ?	Co-leader's Disability Status: ?
Organization Leader Name: ?	Organization Leader Email: ?
Organization Co-leader Name: ?	Organization Co-leader Email: ?

### Board Gender Identity

Female Board Members Percentage: 56.00% ?	Male Board Members Percentage: 44.00% ?
Non-binary Board Members Percentage: 0.00% ?	Board Members who Declined to State Gender Percentage: 0.00% ?
Board Members whose Gender is Unknown Percentage: 0.00% ?	Trans Board Members Percentage: 0.00% ?
Cis Board Members Percentage: 0.00% ?	Board Members who Declined to State Gender Percentage 2: 0.00% ?
Board Members whose Gender is Unknown Percentage 2: 0.00% ?	

# Public Information Work is the Funder's responsibility

Candid

**Candid.**

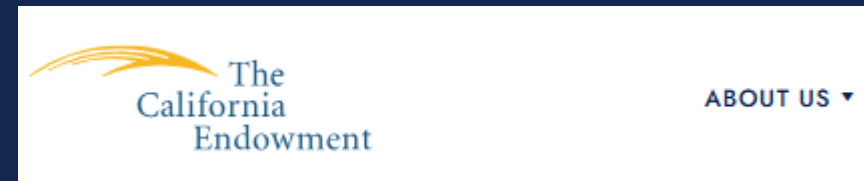
California  
Attorney General



IRS Website




Organizational Website













# How Our Partnership with Candid Expanded Our Access to Data and Insights

## Update Financial Data in GMS

Click here to sync the organization profile with financial and programmatic information from Candid/GuideStar.

 Update Financial Data in GMS

<b>Total Revenue:</b> \$1,325,869.00 	<b>Total Expenses:</b> \$1,831,777.00 
<b>Total Liabilities EOY:</b> \$112,624.00 	<b>Total Assets EOY:</b> \$1,844,275.00 
<b>Months of LUNA:</b> 7.90 	<b>Months of Cash:</b> 9.17 
<b>Net gain/loss:</b>	<b>Filing Year:</b> 2023 
<b>Fiscal Year Start:</b>	<b>990 End Date:</b>
<b>Form Type:</b> 990 	<b>990 Last Modified Date:</b>
<b>FTA PDF:</b> <a href="https://www.guidestar.org/profile/CompFtaPdfLocal/95-4657497?guid=">https://www.guidestar.org/profile/CompFtaPdfLocal/95-4657497?guid=</a> 	<b>GuideStar Financial Trends Analysis:</b>  <a href="#">GuideStar FTA PDF</a>

# Developing a Shared Approach for Gathering and Reporting on Demographic Data

California Demographic Data  
Collaborative



The **James Irvine**  
Foundation



# California Demographic Data Collaboration

Collaboration between  
Weingart Foundation, The  
James Irvine Foundation,  
and The CA Endowment:

- \*Develop an **aligned approach** for collecting and reporting on the demographics of the groups we support
- \*Increase our **understanding of non-profit capacity** with respect to collecting and using demographic data



## Investment in Coordination and Support between Collaborative Partners and Non-Profit Organization (NPO)

Alignment with  
Internal  
Foundation  
Stakeholders and  
Systems

Alignment with  
Messaging and  
Communication

Timing of NPO  
Support and  
Preparation

# Process

- Analysis of Current Foundation Practice
- NPO Engagement
  - Input on practice, tools/taxonomy, and capacity
  - Survey sample – 1204 Response Rate 40%
  - Focus Groups 10 groups, 56 participant
- Explore Shared “platform” options
  - Grants Management Systems’
  - Candid
- Integrate analysis to inform recommendations for tool/taxonomy, capacity building strategies, and a shared collection approach



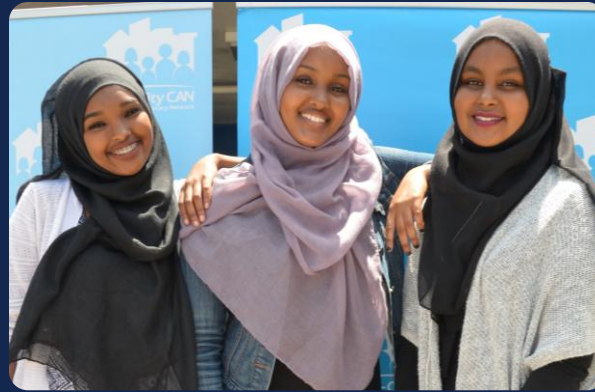
**Candid.**

# CA Demographic Data Collaborative Strengthening CA Through Improved Data Practices



## Phase 1 - 2021

- \*Engaged >1200NPs via survey and 10 focus groups
- \*Extensive research to align on taxonomy and terms
- \*Assessed field wide data collection options.



## Phase II - 2023

- \*Capacity building informed by NPO feedback
- \*Joint request for data increased participation in DvC from 28% to 43% (64% for non-EINs)
- \* Trouble shooting and coordination with Candid



## Phase III - 2025

- \*Capture lessons from Phase I and II to share learnings
- \*Engage the field to promote participation
- \*Strengthen field wide insight and NPO capacity via broad alignment

# Recommendation for Next Steps

## Candid

- \*Stakeholder voices
- \*Continue deep partnership with Candid to strengthen field
- \*Consider a process to request permission from EINs to bulk validate profiles

## Field and Funders

- \*Share findings and learnings with NPOs and peers
- \*Prepare a system/process to send reminders to update profiles
- \*Provide clarity on what is required
- \*Communicate about how the data will be used
- \*Develop strategies that allow the data to strengthen NPOs' work
- \*Provide resources for data collection and data use in general



# Resources

2025 Annual Report

<https://www.calendow.org/annual-report/>

**Next Chapter**

<https://www.calendow.org/strategic-planning/>

**Learning and Evaluation**

Building Healthy Communities (BHC) 10 year Initiative Evaluation

<https://www.calendow.org/learning/>

# Contact Us

Address: 1000 N Alameda Street, Los Angeles    Email: [etabita@calendow.org](mailto:etabita@calendow.org)  
Website: [calendow.org](http://calendow.org)    Phone: 213 928 8751





**From Reporting to Reflection: How a partnership  
with Candid deepens our trust-based approach**

**Gillian Knight MPH MSW**

Program Manager of Learning and Evaluation

# Overview



About Us



Demographic Data Collection Before  
Candid



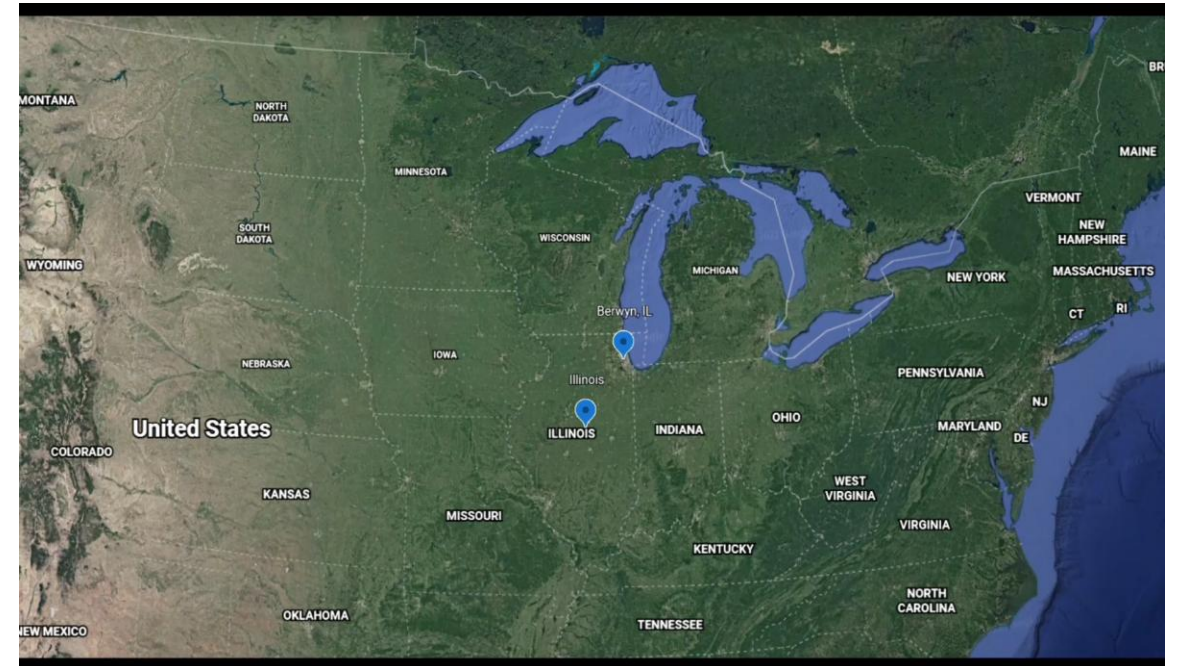
Candid Partnership Roll Out with  
Grantee Partners



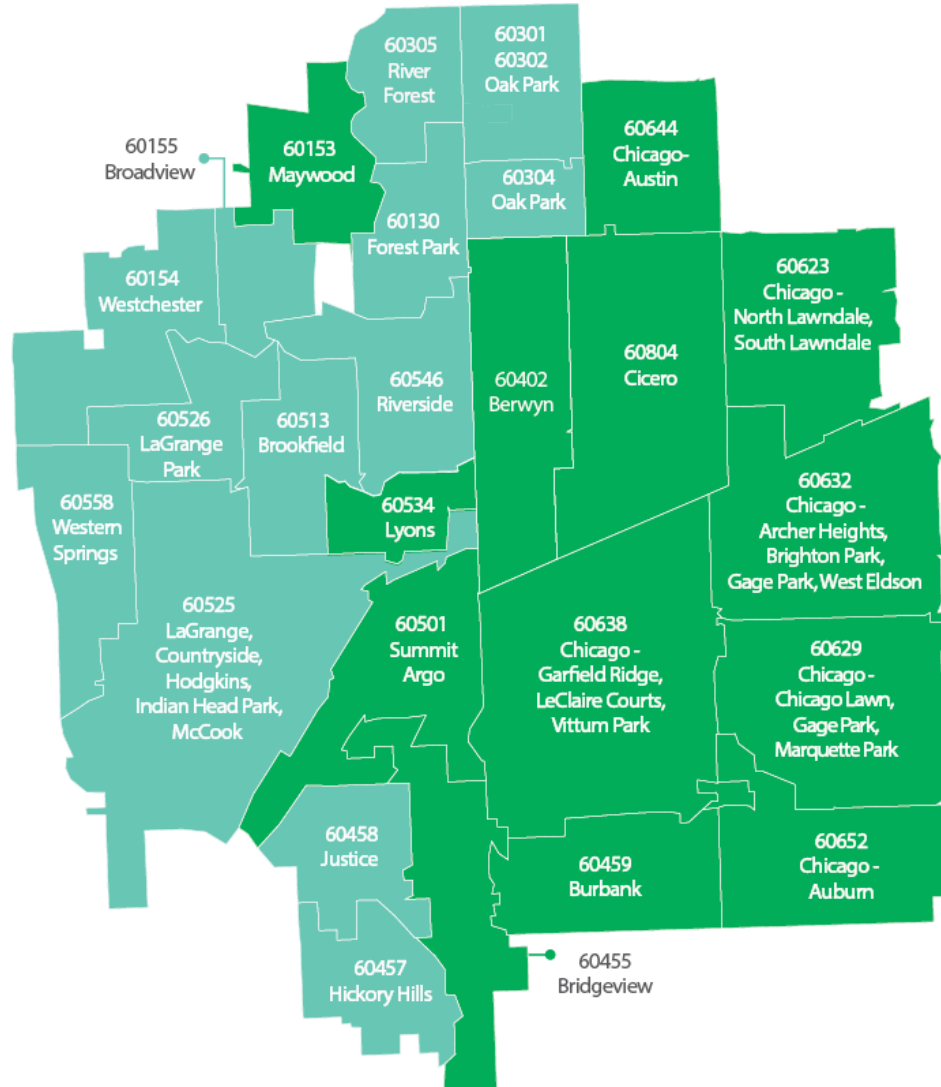
Q&A

# Our Mission

We are a community-informed grantmaking foundation that seeks to measurably improve the health and well-being of individuals, families and communities in our service region by promoting health equity, quality and access.



# Our Service Region



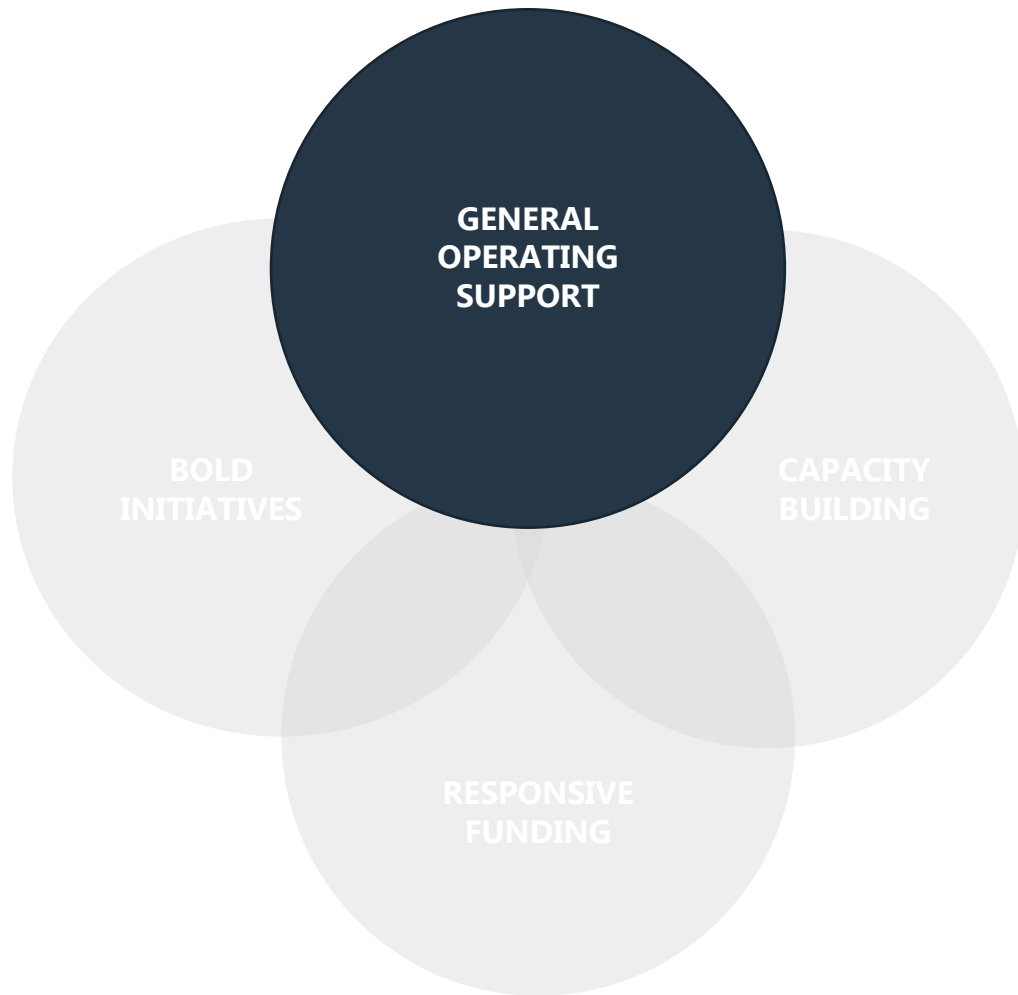
**27** zip codes in Chicago & western Cook County suburbs

**70%** reside in (green) zip codes with health inequities & barriers

**67%** Latinx/e & Black

**25%** Immigrant

# General Operating Support



- Multi-Year Partnerships (32)

## Funding Priorities:



**Access** to Quality Health Services



**Address** the Social Determinants of Health

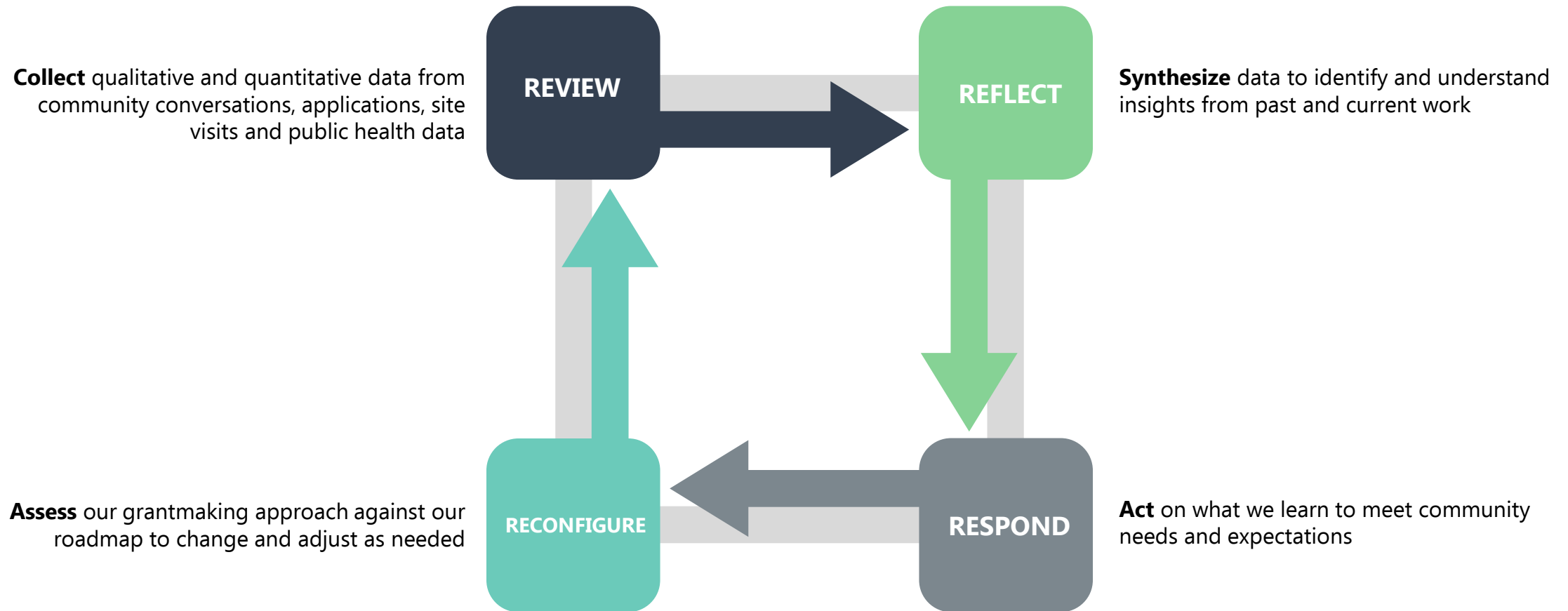


**Advocate** for Health Policy & Systems Change



**Augment** Local Health Knowledge

# Our Learning & Evaluation Framework

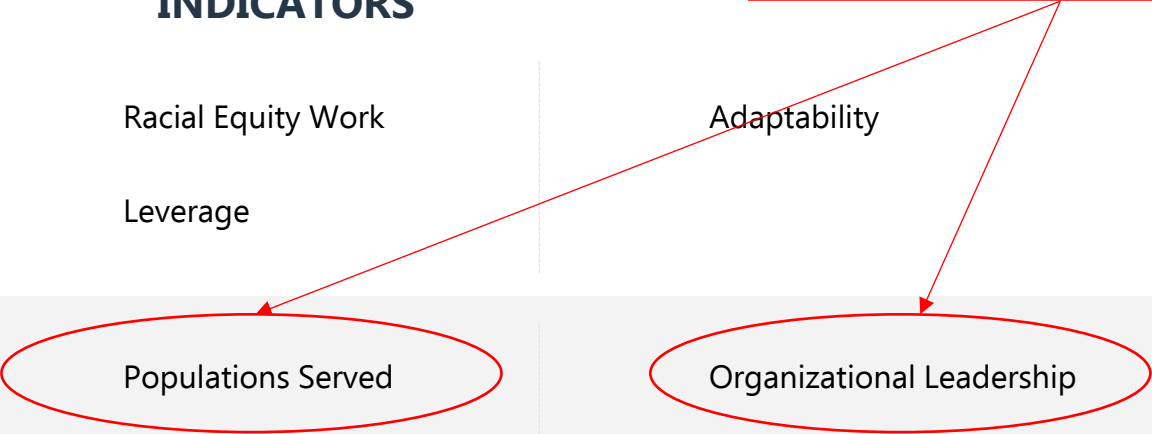


# Data We Collect

## FOR GENERAL OPERATIONS SUPPORT

CATEGORIES	INDICATORS		
<b>Strategic</b>	Budget Size Investments	Racial Equity Work Leverage	Adaptability
<b>Scope</b>	Geographic Reach Funding Priority	Populations Served Funding Relationship (Annual, Multi-Year)	Organizational Leadership General Operating Support Grant Utilization
<b>Population Health</b>	Regional Demographic Shifts	<u>Health Outcomes:</u> Chronic Conditions and Quality of Life	<u>Health Factors:</u> Behaviors, Clinical Care, Socio-Economic Factors, Environment

We collect demographic data for these indicators.



# Demographic Data Specifics

## Organizational Levels

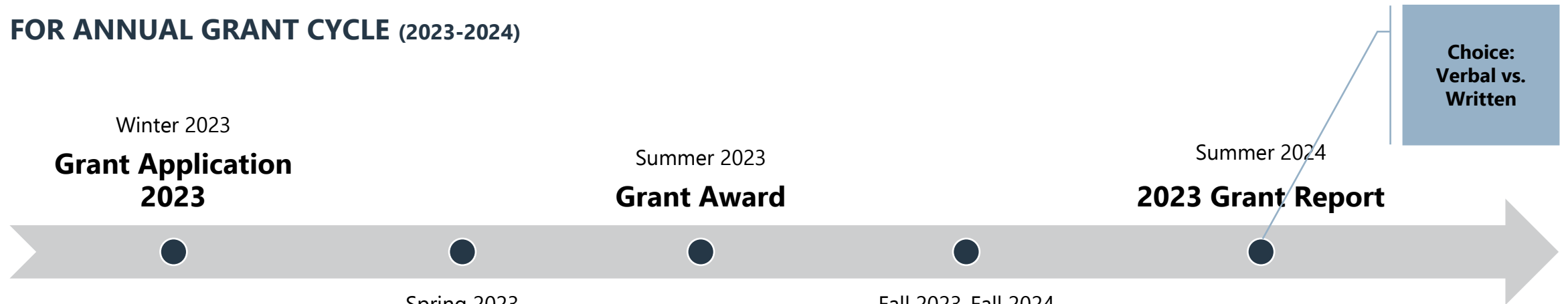
- Board
- Leadership/Executive Team
- Management Team
- Full-time Staff
- Part-time Staff
- Participant

## Data Types

- Racial & Ethnic Demographics
- Gender Identity
- Sexual Orientation
- Disability Status
- **Socioeconomic Status**

# Data Collection Life Cycle: Before Candid Partnership

## FOR ANNUAL GRANT CYCLE (2023-2024)



### DATA COLLECTED

- ✓ Budget Size
- ✓ Grant Utilization (plan)
- ✓ Racial Equity Work
- ✓ Geographic reach
- ✓ Board Demographic
- ✓ ED Demographic
- ✓ Population Served

- ✓ Qualitative additions and clarifications to grant application responses

- ✓ Adaptability
- ✓ Organizational Leadership
- ✓ Grant Utilization (actual)
- ✓ Racial Equity Work
- ✓ SDoH

# Join Me in the Weeds: Reporting Response Options



# What the Annual Grant Report Looked Like

Data Indicator	Type of Question(s)	Count
Adaptability	Narrative *	1
Organizational Leadership	Demographic Data - Matrix Questions	75
	Non-Demographic Data - Y/N	3
Grant Utilization	Programming - Forced Choice	1
	Narrative *	1
	Fiscal Resilience - Multiple Choice	1
	Narrative *	1
Racial Equity Work	Forced Choice	1
	Narrative *	1
Social Determinants of Health	Multiple Choice	1
	Narrative *	1

Option to answer narrative questions through conversations with our learning team

# Tension & Exploration

## Collecting Demographic Data is a Best Practice in Racial & Health Equity Work

- Demographic data collection is a long often laborious process for partners
- Our peers are also asking for this data in different ways and formats

## Trust Based Philanthropy

- Is having organizations share demographic data limiting our ability to be in right relationship with our partners in the work?
- Is our duplicative practice of demographic collection the anthesis of our desire to be trust based in all of our actions as a foundation?

## Doing the Homework

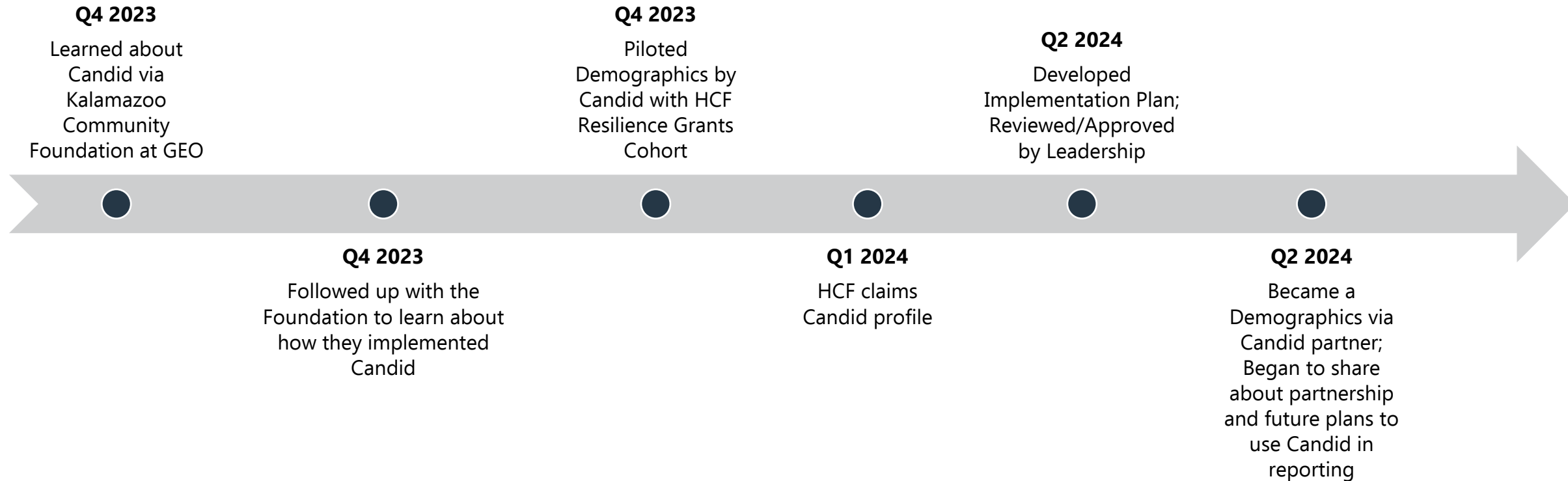
- How are we staying up to date with innovation in the sector?
- How are we making sure that what we believe is "easier" is actually easier?





## **Planning & Implementing Candid Partnership**

# Doing the Homework: Exploring the Use of Candid



# 2024 Candid Implementation Plan

	May	June	July	August	September	October	November	December
<b>WEBSITE</b>								
Learning & Evaluation Webpage				█				
Resources Webpage	█							
2025 Grant Cycle Webpage								█
<b>PUBLICATIONS</b>								
"Reporting to Reflection" Blog				█				
<b>EMAIL</b>								
Outreach to HCF Partners			█			█		█
<b>IN-PERSON</b>								
Talking Points for Site Visits	█	█	█					
MYP Gathering								█
Candid Data Collection Demo (TBD)		█	█	█	█	█	█	█
<b>GRANT PROCESSES</b>								
2023 Grant Reports				█	█	█		
2024 Grant Agreements					█	█	█	
2025 Grant Cycle								█
<b>SOCIAL MEDIA</b>								
Demographic via Candid Partnership				█	█	█		



## **What a Candid Partnership Unlocks for Us**

# Future Annual Grant Reporting with Candid Partnership

## BEFORE

Data Indicator	Type of Question(s)	Count
Adaptability	Narrative	1
Organizational Leadership	Demographic Data - Matrix Questions	75
	Non-Demographic Data – Y/N	3
Grant Utilization	Programming – Forced Choice	1
	Narrative	1
	Fiscal Resilience – Multiple Choice	1
	Narrative	1
Racial Equity Work	Forced Choice	1
	Narrative	1
Social Determinants of Health	Multiple Choice	1
	Narrative	1

**TOTAL: 87 QUESTIONS**

## AFTER

Data Indicator	Type of Question(s)	Count
Adaptability	Narrative	1
Organizational Leadership	<del>Demographic Data – Matrix Questions</del>	<del>75</del>
	Non-Demographic Data – Y/N	3
Grant Utilization	Programming – Forced Choice	1
	Narrative	1
	Fiscal Resilience – Multiple Choice	1
	Narrative	1
Racial Equity Work	Forced Choice	1
	Narrative	1
Social Determinants of Health	Multiple Choice	1
	Narrative	1

**TOTAL: 12 QUESTIONS**

# Reporting





## **Contact:**

**Gillian Knight, [gknight@hcfdn.org](mailto:gknight@hcfdn.org)**



# APPENDIX

# Resources

Available at  
[www.hcfdn.org/learning-evaluation](http://www.hcfdn.org/learning-evaluation)

- [General Operating Support Theory of Change](#)
- ["Aligning Our Walk with Our Talk: 2018-2021" Insights report](#)
- [General Operating Support in Action – 2022-2023 Grantmaking Report and Insights – Healthy Communities Foundation \(hcfdn.org\)](#)
- [2023 Grant Report Guide – Healthy Communities Foundation \(hcfdn.org\)](#)