# BEST PRACTICE GUIDE

## 2019 GuideStar Profile Standard

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

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### LEGEND

- Red* = required to earn a GuideStar Seal of Transparency
- Black = recommended but not required
- ** = information must be latest available (2018 or more recent)

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<table>
<thead>
<tr>
<th>Seal of Transparency</th>
<th>Required (*) and Optional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BRONZE</strong></td>
<td>Provide basic information about your organization so you can be found</td>
</tr>
</tbody>
</table>

#### Identification Information
- **Organization Name**
- **Employer Identification Number (EIN)**
- **Telephone**
- **Fax**
- **Mailing Address**

#### Additional Names
- **Also Known As**
- **Doing Business As**
- **Formerly Known As**

#### Organization Founding
- **Year Founded**
- **Year of Incorporation**
- **Letter of Incorporation**
- **Letter of Dissolution**

#### Address
- **Physical Address**
- **Mailing Address**

#### International Address
- **International Address**

#### Payment Information
- **Legal Name**
- **EIN of Payable Organization**
- **Payment Address**

#### Primary Contact
- **Name**
- **Title**
- **Email**
- **Telephone**

#### Fundraising Contact
- **Name**
- **Title**
- **Email**
- **Telephone**

#### Organization Leader
- **Name**
- **Title**
- **Email**
- **Short Biography**
- **Photo**
- **LinkedIn URL**

#### Organization Co-leader
- **Name**
- **Title**
- **Email**
- **Short Biography**
- **Photo**
- **LinkedIn URL**

#### Other Staff
- **Type**
- **Name**
- **Title**
- **Email**
- **Telephone**

#### Board Chair
- **Name**
- **Company/Organization**
- **Term Dates**

#### Board Members
- **Name**
- **Company/Organization**

#### Mission
- **Mission Statement**

#### Programs and Maps
- **Program Name**
- **Program Description**
- **Population Served**
- **Geographic Area Served**

#### Categorization
- **Keywords**
- **NTEE codes**

#### Brand
- **Logo**
- **Tagline**
- **Website URL** (or “Don’t have one”)

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### 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 (2018 or 2017)
- ✔️ In Platinum, at least one metric must be from 2018
- ✔️ The levels are cumulative—for example, to achieve Platinum requires first fulfilling the requirements for Bronze, Silver, and Gold

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### Seal of Transparency

#### SILVER

Be transparent about your finances so you can build trust.

There are two ways to achieve Silver:

- **Option A**
  - Audited Financial Statement*
  - Fiscal Year* **Must be 2018 or 2017**

- **Option B**
  - Revenue*
    - Contributions, Gifts, and Grants*
    - Program Service Revenue including Government Fees and Contracts
    - Membership Dues
    - Net Income from Special Events
    - Other Expenses and Amounts **Total Revenue**
  - Expenses*
    - Program* Administration*
    - Fundraising Payments to Affiliates
    - Other Expenses and Amounts **Total Expenses**
  - Assets & Liabilities
    - **Total Assets**
    - **Total Liabilities**
    - **Net Assets or Fund Balance at the End of the Year**

#### GOLD

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

- Problem Overview
  - Briefly describe the problem your organization is working to address (max 1,000 char)

- Goals
  - What is your organization aiming to accomplish?* (max 3,000 char)

- Strategies
  - What are your strategies for making this happen?* (max 3,000 char)

- Capabilities
  - What are your organization’s capabilities for doing this?* (max 3,000 char)

- Indicators
  - How will your organization know if you are making progress?* (max 3,000 char)

- Progress
  - What have you accomplished so far and what’s next?* (max 3,000 char)

#### PLATINUM

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

- Measures of Progress and Results
  - Between **1** and up to 20 quantitative metrics selected by your organization
    - **At least 1 metric must be from 2018**
    - Assign a Type of Metric (Input, Output, Outcome, Context or Other)
    - Assign a Direction of Success (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

<table>
<thead>
<tr>
<th>Websites</th>
<th>Website</th>
<th>Blog URL</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Social Media User Names</th>
<th>Facebook</th>
<th>Twitter</th>
<th>LinkedIn</th>
<th>YouTube</th>
<th>Instagram</th>
</tr>
</thead>
</table>

### Demographics of your organization

<table>
<thead>
<tr>
<th>Staff Totals</th>
<th>Number of Board Members</th>
<th>Full-time Staff</th>
<th>Part-time Staff</th>
<th>Senior Staff</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Gender Identity</th>
<th>No. of individuals:</th>
<th>Female</th>
<th>Male</th>
<th>Transgender/unspecified non-conforming</th>
<th>Decline to state</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Race and Ethnicity</th>
<th>No. of individuals:</th>
<th>Asian/Asian American</th>
<th>Black/African</th>
<th>American, Hispanic/Latino/Latina</th>
<th>Native American/American</th>
<th>Indian/Alaska Native/Native Hawaiian</th>
<th>White</th>
<th>Multi-racial or multi-ethnic, Individual(s) decline to state</th>
<th>Other</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Sexual Orientation</th>
<th>No. of individuals:</th>
<th>Lesbian, gay, bisexual</th>
<th>Individuals decline to state</th>
<th>We do not collect this information</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Disability Status</th>
<th>No. of individuals:</th>
<th>Person(s) with a disability</th>
<th>Individuals decline to state</th>
<th>We do not collect this information</th>
</tr>
</thead>
</table>

<table>
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<tr>
<th>Diversity Strategies</th>
<th>Checklist of strategies to address diversity</th>
</tr>
</thead>
</table>

### Board Leadership Practices

<table>
<thead>
<tr>
<th>Not Independently Incorporated</th>
<th>Opt-out for organizations not required to have a board</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Board Orientation &amp; Education</th>
<th>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?</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>CEO Oversight</th>
<th>Yes/No: Has the board conducted a formal, written assessment of the chief executive within the past year?</th>
</tr>
</thead>
</table>

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<tr>
<th>Ethics &amp; Transparency</th>
<th>Yes/No: Have the board and senior staff reviewed the conflict-of-interest policy and completed and signed disclosure statements within the past year?</th>
</tr>
</thead>
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<tr>
<th>Board Composition</th>
<th>Yes/No: Does the board ensure an inclusive board member recruitment process that results in diversity of thought and leadership?</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Board Performance</th>
<th>Yes/No: Has the board conducted a formal, written self-assessment of its performance within the past three years?</th>
</tr>
</thead>
</table>

### Additional Documents

<table>
<thead>
<tr>
<th>Annual Report</th>
<th></th>
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<table>
<thead>
<tr>
<th>IRS Documents</th>
<th>Recent Form 990</th>
<th>Form 990-T</th>
<th>Form 1023 or 1024</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Certifications</th>
<th>Affiliation</th>
<th>Assessment or Accreditation</th>
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<table>
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<tr>
<th>Other Documents</th>
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| Notes from the Nonprofit |
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