Candid's 2030 Vision

The 2030 vision's 10-year frame reflects the long-view required to tackle enduring challenges. It builds on Candid's unique ability to be the information infrastructure that supports organizations as they work toward their missions. Candid will collect, analyze, and distribute data and insights about the work of the social sector, organized around five strategies ...

Contents

Candid (CNDD)

Description:

Candid's role is to ensure the flow of information in and about the social sector.

Stakeholder(s):

Jacob Harold :
Executive Vice President, Candid

Nonprofits :
We developed this vision with critical input from our audiences—nonprofits, funders, and other partners—and through many iterations led by a staff working group.

Funders

Nonprofit Leaders :
Nonprofit leaders devote their lives to social good but ... Now (1) face an opaque and inefficient fundraising process; (2) often oversee precarious business models; and (3) struggle to align with and learn from peer organizations. What if they could (1) reallocate time from paperwork to impact; (2) lower business risk with standardized information on finances, operations, and programs; and (3) collaborate quickly and easily with peers.

Foundation Staff :
Foundation staff oversee immense resources and have great flexibility but ... Now (1) find it difficult to align with other funders; (2) struggle to demonstrate results; and (3) feel guilty about power dynamics with grantees. What if they could (1) confidently align their portfolios with other funders; (2) know their learning was contributing to a shared knowledge commons; and (3) have honest and efficient relationships with grantees.

Donors :
Individual donors are giving more and in more engaged ways but ... Now (1) feel overwhelmed and isolated by a complex giving landscape; (2) often find the experience of giving unsatisfying or incomplete; and (3) cannot leverage the work of professionals. What if they could (1) have a clear feedback loop between their dollars and nonprofits' work; (2) easily find who is giving and who is getting on any issue anywhere in the world; and (3) have access to choices made and lessons learned by professional grantmakers.

Policymakers :
Policymakers, journalists, and corporate leaders need cooperation with the social sector but ... Now (1) find it challenging to identify high-performing organizations as partners; (2) lack understanding of philanthropy and so focus on irrelevant metrics such as overhead; and (3) want to explore innovations such as social impact bonds but are intimidated by complexity. What if they could (1) easily identify trustworthy organizations

that can help them solve problems; (2) understand the unique role and challenges of civil society; and (3) better deploy their capital for good.

Journalists

Corporate Leaders

Vision

A social sector capable of tackling the critical challenges and opportunities of our time.

Mission

To get you the information you need to do good.

Values

Principles: Key principles

Global Scope: We seek to reflect the global social sector. — Alternative we considered but rejected: Limit focus to the U.S. or to a limited number of countries. — Rationale: Many of the problems facing the world—climate change, demographic change, disease—span borders. We can no longer think about the about the social sector only within the boundaries of individual countries. — Implications for resource allocation: Technical infrastructure that can handle data at scale. A global outreach team coupled with a strong partner network.

Inclusion: We serve organizations of all sizes. — Alternative we considered but rejected: Preferential focus on either small or large organizations. — Rationale: The social sector's size diversity is a strength. Smaller organizations are often "closer to the ground," reflecting the needs of specific communities and bringing deeper legitimacy. Larger organizations often have economies of scale and unique capabilities. We cannot hope to tell the social sector's story without reflecting these unique roles. — Implications for resource allocation: Pricing structure appropriate for small nonprofits. Higher stakeholder support costs.

Comprehensiveness: We are working to build a comprehensive data system for the social sector. — Alternative we considered but rejected: Focus just on web tools or on wholesale partnerships. — Rationale: If we focus on only strengthening our web tools, we will miss the many users whose experience of the Internet is primarily through major platforms (this pattern is especially acute in China). But if we fully cede user experience to platforms, we will not be able to experiment with new approaches or highlight crucial, sector-specific nuance. — Implications for resource allocation: Parallel sales, marketing, and product development for both web and platform tools.

Diversity: We reflect political diversity. — Alternative we considered but rejected: Explicitly reflect the center-left perspective of many in the field. — Rationale: The social sector reflects the full political diversity of many societies. In others, it is artificially constrained by government policy. If we pick a side, we risk alienating part of our sector and our user base and jeopardize our most important asset: trust. — Implications for resource allocation: Potential loss of staff wanting to engage in advocacy. Additional care in hiring for political diversity.

Identity: We believe identity is important in the social sector. — Alternative we considered but rejected: Maintain an "identity-blind" stance that does not highlight diversity. — Rationale: Identity matters in the modern world. Many parts of the social sector are organized along dimensions of identity. Further, there is—at least in the United States— a clear demand for information about demographics of the leadership of social sector organizations. — Implications for resource allocation: Tech resources to integrate multiple identity taxonomies. Need for staff development of cultural competency.

Effectiveness: We believe the social sector is a force for good. — Alternative we considered but rejected: Take an explicitly critical stance of the field. — Rationale: Our own data shows the immense impact of the social sector. Candid is itself a part of the social sector, and we exist to help it be as effective as possible. — Implications for resource allocation: None

Excellence

By 2030, Candid will provide a comprehensive global data system that supports excellence throughout the social sector.

Stakeholder(s)
Social Sector

1. Data

Build a real-time global data collection system

Real Time: build a real-time global data collection system ... WHY: To accurately describe the sector at scale and to provide actionable information to the field, we need a more robust, active, stable, and current data collection system. Potential milestones: By 2023, we will draw grant, nonprofit, and issue data from 50 government data sets (annually) and 1 million news articles and websites (daily).

1.1. Government Data

Use government data as a foundation.

Although public nonprofit and foundation data in the U.S. is increasingly commoditized, there are dozens of untapped publicly available data sets around the world that could enrich our database.

1.2. Real-Time Data

Layer on real-time data.

Project Real Time, our program to scrape news feeds and social media, has already demonstrated Candid's ability to gather daily data on grants, leadership changes, RFPs, and more. We can upgrade it to give users information that they can act on every day.

1.3. Contributed Data

Layer on contributed data.

Expanding our voluntary data collection program will allow organizations around the world to plug their content into a global data system for the social sector. Most prominently, it will include organization-level data (see Common Profile, below), but it will also comprise grants data, practice insights, and knowledge.

1.4. Data Standards

Create a comprehensive set of open data standards.

Align a set of data standards—protocols, taxonomies, and unique identifiers—under a common governance structure, update cadence, and intellectual property umbrella.

2. Organizations

Establish common organizational profile(s)

Common Profile: establish global common organizational profile(s) ... WHY: The social sector is fragmented, leaving individual organizations culturally and operationally isolated. Through a common profile we can increase the throughput of basic organizational information, reduce waste, reveal diversity, and build shared identity. Potential milestones: By 2026, 300 platforms will have integrated our data; by 2030, 500,000 social sector organizations will be updating their profiles annually.

2.1. Expansion

Expand the Profile Program.

We have made significant progress in creating a common profile in the U.S., with 200,000 nonprofits providing Candid at least some standardized information about themselves. We have seen more limited success in getting philanthropic foundations to do the same. We will take this idea and, first, make it global, allowing nonprofits and foundations all over the world to craft their own profiles. In addition, we will open it to other organizational forms: social businesses, fiscally sponsored projects, individual donor-advised funds, etc.

2.2. Benchmarking

Support multiple models for performance benchmarking.

We need to offer a framework that shows many ways to judge performance—whether of an individual nonprofit, a foundation, or an intervention. No single approach is going to win over all stakeholders. Indeed, that is a good thing, and Candid has no aspiration to provide a definitive rating. Instead, we are positioned to show multiple different lenses on impact—at the organizational level, the population level, and the systems level. Then it is our job to step aside and let others to make decisions based on that multidimensional view.

2.3. Demographic Data

Launch a field-wide campaign to collect demographic data.

There is clear demand in the United States for better data about the demographics of nonprofit and foundation staff, boards, and beneficiaries. Globally, we are already collecting and analyzing this data in multiple ways. But we need to weave these data sets together into a single, coherent program to show how identity plays out in the social sector. This set of issues manifests differently in other countries but is relevant in all.

2.4. Data Distribution

Reinforce profiles with expansion of the Data Distribution Network.

We need to increase the incentive for organizations to share data by ensuring its use on major technology and financial, especially giving, platforms. We have a head start with 200+ platforms already using our data but need (1) greater geographic diversity in both source and use of that data and (2) deeper integration of our data into partners' user interfaces.

3. Places

Create global networks for place-based learning and data collection to access our data

Real Places: Create global networks for place-based learning and data collection ... WHY: If Candid only connects with people online, we risk losing touch with the on-the-ground reality of social change. Potential milestones: By 2026, partners in 20 countries will have implemented Candid's free data collection platform; by 2030, 650 organizations around the world will offer free, on-site access to our information, tools, and training.

3.1. Learning Experiences

Strengthen and focus our learning experiences.

We will bolster our learning offerings by (1) developing standardized content that centers participants' focus on Candid products/services and other core competencies; (2) expanding certifications to include credentialing for partners and the general public; and (3) enlisting the right partners and formats—online/offline—for effective program delivery. This set of efforts will require significant sensitivity to place, especially outside the United States.

3.2. Physical Partners

Expand our physical partner network.

We will expand on the model of the Funding Information Network, i.e., free access to tools and/or training in a physical location. As with the data partnership network (cited below), global expansion of our physical network will require the appropriate pricing structure, an expanded support system, and deep respect for local context.

3.3. Peer Partners

Strengthen our global data, issue-based, and peer partner network.

To collect data at scale, we'll need on-the-ground partners around the world. And to get their engagement, we'll need to offer them a powerful value proposition complemented by potential incentives related to Candid's brand, services, and products. This strategy will require partnerships with governmental and multilateral agencies as well as national, regional, and global affinity groups, associations, and similar networks. Furthermore, we recognize that social sector communities are not always organized around geography. Individuals in the social sector often identify most intensely with an issue area—they are part of the performing arts community or the climate change movement. Others find community based on demographics, belief systems, or functional roles. Accordingly, we will also partner with existing issue communities and practice networks, even if they are not rooted in a particular place. Our approach across the globe will continue to authentically embrace values of transparency, accessibility, diversity, equity, and inclusion, while remaining adaptable to evolving needs and creating mutually beneficial relationships with stakeholders.

4. Views

Weave our data sets together

Full View: weave our data sets together ... WHY: Social sector data has long been trapped in silos by category. To increase capacity for insight, we need to cross-reference data and show connections across categories (e.g., to show the distribution of funding versus the distribution of need). Potential milestones: By 2024, our tools will

fully cross-reference information across six categories: (1) social issues, (2) social interventions, (3) organizations, (4) grants, (5) news, and (6) practice

4.1. Cross-Referencing

Cross-reference different types of data.

Our data is most powerful when it allows a user to compare across the six categories of social change information: issues, interventions, organizations, grants, news, and practice.

4.2. Products

Concentrate on a core set of flagship products.

Leverage existing and new tools by integrating them into four core products, supported by a scalable data and technology infrastructure ... For each of these four products, we will have to act thoughtfully as we seek to expand adoption around the world, customizing for localized or issue-based context as much as necessary, but no more. We will also need to incorporate as much real-time data into them as possible, to keep our content as useful as possible and to increase the depth and frequency of user engagement.

4.2.1. Fundraising

Globalize tools such as Foundation Directory Online.

(1) Fundraising tool: globalize tools such as Foundation Directory Online, adding features that help give more meaningful and actionable content for users in new and varying contexts.

4.2.2. Organizational Analysis

Help users evaluate nonprofits in different legal and regulatory environments.

(2) Organizational analysis tool: expand the current GuideStar Pro tool worldwide to help users evaluate nonprofits in different legal and regulatory environments.

4.2.3. Nonprofit Landscape

Enrich issues with mapping and research content plus selected nonprofit and foundation data.

(3) Landscape tool: evolve the idea of landscape portals to help address important, timely issues, enriched with mapping and research content plus selected nonprofit and foundation data.

4.2.4. Branding & Content

Combine GrantSpace, GrantCraft, and GlassPockets under a singular sub-brand and place emphasis on core content.

(4) Practice tool: combine GrantSpace, GrantCraft, and GlassPockets under a singular sub-brand and place emphasis on core content.

4.3. User Experience

Craft a more coherent user experience.

Our users currently have a fragmented experience with our tools. We need a single user database, a single-sign-on experience, and clear common branding. That alignment can help us craft coherent experiences for each of our key user categories (e.g., nonprofit professional, individual donor, foundation staffer, researcher).

4.3.1. Database

Implement a single user database.

4.3.2. Sign-On

Implement a single-sign-on experience.

4.3.3. Branding

Promote clear common branding.

4.4. Intelligence

Turn user behavior into intelligence.

Our users represent a cross section of people interested in the social sector. Their choices are a barometer of interest and intention that we have yet to tap. Appropriate use of this data would offer new insights to the field as well as to ourselves. We can gather this data (1) directly through usage patterns of our web tools and (2) through qualitative insights gathered from real-time interactions with actual people through our place-based network.

4.4.1. Usage Patterns

Gather data through usage patterns of our web tools.

4.4.2. Interactions

Gather data through qualitative insights gathered from real-time interactions with actual people through our place-based network.

5. Stories

Explain the social sector

Full Story: explain the global social sector ... WHY: Modern society is riddled with misconceptions about the social sector. We need to articulate and share compelling, fact-based narratives about the social sector. Potential milestones: By 2022, we will have launched a campaign to increase understanding of the social sector with (1) a

set of tools and visual collateral, (2) a decade-long formal research agenda to describe and analyze the social sector, and (3) a comprehensive curriculum of good practices in the social sector.

5.1. Understanding

Leverage our resources to build understanding of the social sector.

There is a general confusion as to the nature and work of the social sector. Candid is well positioned to help people understand the social sector's scope, constraints, and potential.

5.2. Prediction

Build predictive tools.

Once we have organized a global baseline of descriptive data, we'll be positioned to offer a next level of insight and analysis—including predictions of future trends and filling gaps in existing knowledge.

5.3. Research

Launch a decade-long research agenda.

Candid's research function will be less fundraising- or client-driven. Instead, we will craft an explicit research agenda with a set of big-picture, longer-term topics. We'll start by answering basic questions: How many nonprofits are there in the world? What is the policy context by country? And we'll also wrestle with hard questions: How should we understand the effectiveness of social sector work? How does the health of a given society relate to the health of its social sector?

5.4. Communications

Run a set of targeted communications campaigns.

Launch a multi-pronged communications strategy that proactively leverages Candid's resources and those of our partners to explain the sector to specific audiences across the world.

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