**FOR 501(C)(3) PARTNERS**

**Demographic Data Collection & Reporting Process**
 **SAMPLE PROCESS**

1. Review the **sample demographic survey** and make any needed modifications to meet the needs of your organization.

* Note: you are welcome to alter the format and content of the survey.  KZCF has provided a Microsoft word version and a PDF version.  You are welcome to create any other type of document/survey that meets your needs – you do not need to utilize the templates provided by KZCF.

2. Determine how, where, and by whom you will store board and staff demographic data to **ensure anonymity and confidentiality**.  Who will have access to the data, and under what circumstances?

3. Review **sample messaging** and make any needed modifications to meet the needs of your organization.

4. As time allows/as appropriate, introduce the initiative to board and staff members, and **discuss how demographic data will be used** in your organization to advance diversity, equity, and inclusion goals. Allow space for questions and discussion.

* Note: It is important to recognize that an individual’s demographic information is highly personal, and some individuals may feel uncomfortable disclosing.  Be sure to consistently communicate that individuals may decline to state their response to any question.

5. Set a deadline for board and staff to complete and return the demographic survey.

6. Send the demographic survey to board and staff, ensuring to repeat the message that individuals may decline to state their response to any question.

7. Gather responses and aggregate staff and board demographic information, ensuring to maintain three categories: all staff, senior staff, and board members.

8. If you have not already done so, **claim your organization’s profile on GuideStar**. More information [here](https://guidestar.candid.org/claim/).

9. If you have not already done so, enter the information needed to **achieve a Bronze Seal of Transparency**.  More information [here](https://guidestar.candid.org/get-bronze/).  This includes:

* Organization mission and contact details
* CEO/Executive Director’s name
* Donation information (how to donate)

10. If you have not already done so, enter the information needed to **achieve a Silver Seal of Transparency**.  More information [here](https://guidestar.candid.org/get-silver/).  This includes:

* Programming information
* Brand details (website, social media, logo)

11. If you have not already done so, enter the information needed to **achieve a Gold Seal of Transparency**.  More information [here](https://guidestar.candid.org/get-gold/).  This includes:

* Audited financial report or basic financial information
* Board chair name(s)
* Staff and board demographic information

*Note: If your organization has already achieved a Gold Seal of Transparency but your posted information does not include all the demographic information items (race/ethnicity, gender identity, sexual orientation, and disability), please update your profile to include all four sections.*

*Note: If your organization has already gathered comparable board and staff demographic data, you are welcome to utilize the existing data to achieve the Gold Seal of Transparency.*

**SAMPLE TIMELINE**
*This timeline is intended only as a resource; following this timeline is not required.*

Week 1:

* Determine process for storing demographic data to ensure anonymity and confidentiality
* Review and modify sample demographic survey
* Claim GuideStar profile

Week 2:

* Introduce initiative to board and staff members
* Review and modify sample messaging
* Achieve Bronze Seal of Transparency on GuideStar

Week 3:

* Send demographic survey to board and staff members, with two-week timeline for completion
* Achieve Silver Seal of Transparency on GuideStar

Week 4:

* Gather any additional information needed to achieve Gold Seal of Transparency on GuideStar

Week 5:

* Begin aggregating demographic data
* Begin inputting information needed to achieve Gold Seal of Transparency on GuideStar

Week 6:

* Finalize aggregation of demographic data
* Achieve Gold Seal of Transparency on GuideStar

Week 7:

* Finalize any remaining action items

**SAMPLE MESSAGING**

Dear [Staff/Board Member]:

As of 2023, the [Kalamazoo Community Foundation](https://www.kalfound.org/) (KZCF) is requiring all grantee partners to gather and report staff and board demographic information annually. KZCF will use this data to advance racial equity priorities, internally and across the nonprofit sector in Kalamazoo.

As a partner of KZCF, [Organization name] will be working to achieve a Gold Seal of Transparency on [Candid](https://www.guidestar.org/), which includes publicly sharing board and staff demographic data. Please complete and return the [attached/linked] demographic survey by [date]. Staff and board demographic data will be shared in the aggregate on [organization name’s] GuideStar profile.  We recognize that demographic data can be highly sensitive, and that you may not feel comfortable responding to all questions. You are welcome to select “decline to state” for question(s) you would prefer not to answer. All individual data will be maintained confidentially by [the HR department].

How does demographic data advance equity in the nonprofit sector? Collecting and analyzing board and staff demographic data supports organizations in tracking progress towards diversity, equity, and inclusion goals, and ensuring accountability in building representative leadership (in terms of race, ethnicity, gender, sexual orientation, and disability status).

Thank you for your participation in this pilot initiative! Please contact [individual] with questions.

Sincerely,

**FREQUENTLY ASKED QUESTIONS**

* **How is senior staff defined?**
	+ Candid defines senior staff as: “Senior Staff includes the leader and is defined as people with authority over budget (typically VP, C-Suite, Director)”
* **Do we need to have 100% staff and board participation?**
	+ No, 100% staff and board participation is not required to obtain your Candid profile and report on board and staff demographics. We encourage partners to maximize board and staff participation to the extent possible, while recognizing that 100% completion may not be feasible.
* **Can we use Google Forms, Survey Monkey, or some other format for the survey?**
	+ Yes, you are welcome to use any format of survey that meets the needs of your organization. You are not required to use the samples provided by KZCF, nor are you required to use the exact language included in the sample survey. You are welcome to modify the language and format to best suit the needs of your organization.

**ADDITIONAL RESOURCES**

* [Candid’s 2022 Seals of Transparency Guide](http://cdn.candid.org/images/nonprofit-profiles/seals/2022/candid-seals-guide-2022.pdf?_gl=1*15x8b3o*_ga*MjIwNTMzNTc2LjE2Mzg5OTcyODU.*_ga_5W8PXYYGBX*MTY1NjYwMzEzNS4yNS4xLjE2NTY2MDUzNTguNjA.&_ga=2.76770391.316732464.1656535475-220533576.1638997285)
* [Candid’s How to Collect and Share DEI Data](https://cdn.candid.org/pdf/candid-dei-data.pdf?_gl=1*1b0mc6s*_ga*MjIwNTMzNTc2LjE2Mzg5OTcyODU.*_ga_5W8PXYYGBX*MTY1NjYwMzEzNS4yNS4xLjE2NTY2MDM0MjkuMjg.)
* [Use Informed Consent to Build Trust and Answer that Damn Demographics Survey on Grant Applications](https://communitycentricfundraising.org/2021/12/06/use-informed-consent-to-build-trust-and-answer-that-damn-demographics-survey-on-grant-applications/) by Allison Celosia for Community Centric Fundraising
* [So You Want to Collect Demographic Data: Getting Started](https://www.d5coalition.org/wp-content/uploads/2015/12/Tips-for-data-collection-12.8.151.pdf) from D5
* In case you’re interested, check out [KZCF’s Guidestar profile](https://www.guidestar.org/profile/38-3333202), which includes our demographic data.