

Welcome!

to A Sampling of FREE
Nonprofit and Foundation
Research Resources

Please feel free to introduce yourself in the chat.





Today's Agenda

- Introductions
- Chat Out Scenarios
- Free Demos of Databases and Websites
- Q&A



Founded in 1969, Philanthropy MA is a **membership association** for **grant makers** and **grant seekers**, bridging the two to build understanding, efficiency, and impact.

Funder Members

- **160** public, private, and corporate funding institutions
- represented by more than **1,000** individuals

Nonprofit Members

- **360** nonprofit organizations
- representing a broader network of more than **5,000** professionals and volunteer leaders

Through our **Nonprofit Partners Program**, we provide **fundraising training**, access to **grants resources and tools**, and **authentic engagement with the funder community**. Our niche is supporting the small to mid-sized development team.



Member Benefits

- **Cohort-based trainings** and **certificate programs**
 - Fundraising Certificate - 6 months (19 CFRE credits)
 - Fundraising Essentials for Executive Directors - 3 months
- **Skill building workshops** on all aspects of nonprofit fundraising from creating annual appeals to building relationships with major donors and foundation/corporate funders
- Access to **grants research tools**
- Grants research **tutorials** and application **coaching**

Our niche is supporting the small to mid-sized fundraising team

Nonprofit Consultants Network

Mission

The [Nonprofit Consultants Network](#) is a Greater Boston-based forum for independent consultants and capacity builders who work with nonprofits, government agencies, and the private sector.

We serve the community as a resource by providing access to professionals dedicated to high-quality, ethical service, and by offering programs of significance to the nonprofit community.

Members

Almost 200 consultant members in areas such as Board Development, Capacity Building, Campaigns, Development/Advancement, Diversity, Event Planning, Executive Search, Financial Management, Grant Writing, HR, Strategic Planning, Training, Writing/Editing, and many more

Member Directory profiles include areas of expertise, bios, and contact information

Member Benefits

- Monthly programs – including new Business Innovation Circle events
- Email list with helpful members
- Low Cost (\$100 per year - \$25 first 6 months)



Philanthropy Massachusetts seeks to create a welcoming, safe and respectful space to enhance the open exchange of ideas. We are committed to fostering an environment of humility, exploration and courage.

To this end, our expectations are that program and network participants:

- Respect confidentiality. Share ideas, not IDs. Take the learnings with you.
- Accept that different truths can coexist. Practice “both/and” thinking.
- Maintain and foster a safe space; restore when necessary.
- Honor all forms of participation and engagement.
- Refrain from any form of solicitations.

In the event you believe these expectations are not being followed, please reach out to a member of the Philanthropy Massachusetts team. All feedback will be taken in confidence.

Scenarios

- #1** Can you help me find a list of all of nonprofits in Cambridge, MA involved with the environment?
- #2** Can you help me find a list of all foundations in Worcester MA that have Assets over \$1M?
- #3** Can you help me find funders that accept unsolicited applications and are funding Arts & Culture organizations in Barnstable county?

impala – General

Website – <https://impala.digital>

FAQs – <https://impala.digital/help-center/impala-faqs>

General Information

- No. of Organizations: \$2.91M (9/28/23)
- No. of People: 5.98M (9/28/23)
- History
- How to create an account

Features

- Search
- Ecosystems
- Lists
- Paths (not free)

Cost

Free for first two years for MA based NPOs and other selected groups

impala – Search – Organizations

Three Components:

- Search box
- Search Filters (for People also)
- Sort By (for Results)

impala – Search – Organizations

Search Filters (for People also):

- Grantmakers only (foundations) – turn on or off
- Geographies – city/county/state
- Causes (includes subcategories) – e.g. Arts and Culture, Education, Health, etc.
- Attributes (can Include or Exclude) – Open for Solicitation, DAF Sponsor, type of foundation, etc.
- Annual (Operating) Budget amount – “We add the amount from lines 15 (salaries, other compensation, and employee benefits) and 17 (other expenses which is a sum lines 11a-11d, 11f-24e in part IX of the 990) on the first page of the 990.” Source: [impala help center](#)
- Leadership – Women/BIPOC/LGBTQ

impala – Search – Organizations

Sort By:

- Most Relevant – default
- Total Assets (High to Low or Low to High)
- Name (A to Z and Z to A)

impala Search – Organizations

At Top of Profile:

- 990 forms
- Icons to add organization to a List or Paths (not free)
- Icons to Website and Social Media platforms

Four Profile Sections:

- Impact (Nonprofit mainly completes) – Cause Area, Populations, Key Impact Metrics, Programs
- People
- Financials (Includes funder summary and grants received)
- Funders (Foundation/Nonprofit funding) - Not always displayed

impala – Search – Organizations

Profile - Finances:

- Current Financials
- Operating Budget Size graph - 6 years
- Funder change graph – 6 years
- Revenues vs. Expenses graph – 6 years
- Assets vs. Liabilities graph – 6 years
- Revenues Breakdown graph – 6 years
- Expenses Breakdown graph – 6 years
- Funder Summary and Grants Received

impala – Search – Organizations

Profile – Financials/Funders - Funder Summary and Grants Received:

- **Funder Summary**

- Total funding /no. of years received/percentage of total funding by grantmaker
- Click on funder for individual grants received

- **Grants Received**

- Description
- Year
- Size

impala Search – Organizations

Profile – People:

- Alphabetical/reverse alphabetical listing by first name with Position Type, Year, and Compensation (if available)
- Click on + sign for a name to get reverse chronological annual data for this person

impala – Search – Organizations

- #1** **Sample Search:** Can you help me find a list of all of nonprofits in Cambridge, MA involved with the environment?

- #2** **Sample Search:** Can you help me find a list of all foundations in Worcester MA that have Assets over \$1M?

impala – Search – People

Features: Will show if name matches POTENTIALLY under multiple organizations

Why Useful: Find if person (could be donor) served as nonprofit executive or on board(s)

- Search by Name/Title AND/OR Organization
- Sort: Relevance (default), A to Z, Z to A
- Filters (same as Organization search): Grantmakers, etc..

Note: Individual entry ONLY links to organizational profile; can look up person under Organization search or look at 990/990PF form

impala – Search – People

Sample Search:

Susan L. Stubbs, CEO of ServiceNet in Northampton, MA



impala – Ecosystems

Features:

- Search by geographic location and topic area
- See overlap of grantmakers funding the same organization
- Can filter out funders not accepting unsolicited applications



Nonprofit Explorer (ProPublica) – General

General:

- **Website:** <https://projects.propublica.org/nonprofits/>
- **Which Nonprofits Included:**
 - 27 types
 - 990, 990EZ and 990PF filings ONLY
Note: Nonprofits with >\$50,000 in Revenues NOT included
- **Tax Forms Availability:**
 - 20+ years of 990s/990PFs/Audits/etc. available.
 - Note: Can access individual tax form Schedules as well

Nonprofit Explorer (ProPublica) – Search

Search - Three Types:

- **Organization** – By name, location
- **People** – Nonprofit executives/board members
- ***Filing Text** – Search for term within entire text of tax forms (990/99PF)

Nonprofit Explorer (ProPublica) – Search

Organization Search Why Useful:

- Many years of 990/990PF forms in multiple formats
- Prospect list by location and other criteria

Search Filters for Organization (Apply button at bottom):

- Sort (Reverse too) – Best Match, Organization Name, City, State, Subsection code, Recent Year Revenue
- State
- Recent Annual Revenue
- NTEE codes – Note: Cause Areas listed only for area searched (sub-codes not listed in Filters but on nonprofit profile ONLY)

Nonprofit Explorer (ProPublica) – Search

People Search Why Useful: Same as impala

Search Filters for People:

- Year
- State
- Org Comp - volunteer

Nonprofit Explorer (ProPublica) – Filing Text

Filing Text search Why Useful:

- Find out grantmakers for nonprofit
- People who serve on volunteer boards or executives
- Stocks owned by Foundation

Search Filters for Filing Text: Form (and Schedule),
Year, State

Nonprofit Explorer (ProPublica) – Filing Text

Sample Search:

- **Organization:** Worcester, MA Foundations with \$1M in Revenue
- **People:** Susan or Sue Stubbs – Nonprofit board work
- **Filing Text :** Servicenet – Who has given grants to (Schedule I of 990PF)



IRS Exempt Organizations Business Master File

General: Best tool to find ALL nonprofits/foundations

Search for Charities (and links to three types of searches):

- [Tax Exempt Organization Search](#) (and main page)
- [Exempt Organization Business Master File](#) (by State or Region)
- [Tax Exempt Bulk Downloads](#) (by type of form)

IRS Exempt Organizations Business Master File – Search for Charities

Why Useful:

- Smaller Nonprofits (all 990/990PF forms available except 990-N – Note: Some information available for nonprofits filing 990-N form such as address and contact person)
- International charities
- Special forms – Determination Letter, Auto Revocation List, Pub 78, etc.
- **Search Criteria** – Different 990 forms (geographic limitation: 990, 990-EZ, 990PF, 990-T forms), City, State, Country Organization Name/EIN
- **990 Forms** - up to 6 years available

IRS Exempt Organizations Business Master File

– Exempt Organizations Business File Extract

Why Useful: Reasons in previous slide plus in spreadsheet can filter by numerous criteria (including 990PF)

- Download by State, Region, Puerto Rico, or International
- Also statistics for nonprofits, foundations, etc.

Limitations of Download:

- Use [PDF guide](#)
- No 990/990PF forms available

IRS Exempt Organizations Business Master File – Exempt Organizations Business File Extract

Sample Search: Can you help me find a list of all foundations in Worcester MA that have in Assets over \$1M?



Free Sources of Requests for Proposals:

PND RFP Updates (Candid): Allows you to filter by state and topic and get RFPs emailed to you

City of Boston Funding Update: Simply add your email and get listings of state, federal, foundation RFPs

Instrumentl: Free 14 day trial

Grant Gopher: Free with Mass Nonprofit Network (MNN) Membership

Pay Resources: Free in Certain Settings

Foundation Directory Pro (Candid): Available at select libraries

DAFinitive: Resource on Donor Advised Funds



Upcoming Programs

Nov 9

10am-12pm

It's a Marathon, Not a Sprint: Building and Maintaining Major Donor Relationships

Dec 1

9-10am

Fundraising Friday:

Meet Candid & Guidestar Staff and Learn Why Your Org Should Go for Gold!



Dec 6

10-11:30am

Engage, Inform, Persuade: Data Storytelling Workshop

Dec 12

10am-12pm

Introduction to Grants Research

Feb 28

10am-12pm

The ABCs of Capital Campaigns

Roger Magnus

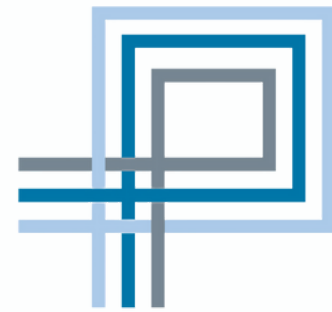
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Thanks for joining us!



PHILANTHROPY
MASSACHUSETTS

[Georganna Woods](#), Research Specialist
