

An open grant report to MacKenzie Scott and Dan Jewett

To date, we have decided to deploy just over two-thirds of your gift to:

- 1. Build an integrated product suite that streamlines data access and unleashes future expansion
- 2. Establish an innovation fund to seed next generation ideas
- 3. Take care of Candid staff

Please note that 1 and 2 were only green-lighted last month, due to our planned leadership transition in October 2021.

Infrastructure, risk-taking, and staff well-being are all essential for progress, yet difficult for most nonprofits to prioritize given both tight budgets and funding constraints. We hope that more donors will follow your lead in making these types of deep, unrestricted gifts that enable us all to make smart choices for our collective future, rather than resorting to the equivalent of duct tape and baling wire. We could not be more grateful for your investment in our work and look forward to keeping you updated on our progress.

Contents

- Vision.....3
- Mission.....3
- 1. Products.....4
 - 1.1. Simplification & Unification.....4
 - 1.2. Technology.....5
- 2. Innovation.....6
 - 2.1. Funding.....6
 - 2.2. Solutions.....6
- 3. Staff.....8
 - 3.1. Bonuses.....8
- 4. Additional Needs.....9
 - 4.1. Marginalized Organizations.....9
 - 4.2. Data.....9
 - 4.3. Equity.....10
- Administrative Information.....11

Candid (CNDD)

Stakeholder(s):

Ann Mei Chang :

Ann Mei leads Candid in harnessing the precision of data, the power of technology, and the compassion of the social sector to increase its collective ability to do good during these unprecedented times of disruption and need.

*She is a leading expert on social innovation and the author of *Lean Impact: How to Innovate for Radically Greater Social Good*. Ann Mei served as chief innovation officer at the U.S. Agency for International Development and the first executive director of its U.S. Global Development Lab. In addition, she was chief innovation officer for Pete for America, chief innovation officer at Mercy Corps, and senior advisor for women and technology at the U.S. Department of State.*

Prior to her work in the public and social sectors, Ann Mei was a seasoned technology executive, with more than 20 years of experience at Google, Apple, and Intuit, as well as at a range of startups. As senior engineering director at Google, she led worldwide engineering for mobile applications and services, with a mission to bring the next billion people online.

She was recognized as one of the “Women in the World: 125 Women of Impact” by Newsweek/The Daily Beast in 2013, “23 most powerful LGBTQ+ people in tech” by Business Insider in 2019, and “20 Top LGBTQ+ Entrepreneurs, Executives and Thought Leaders” by Global Shakers in 2019.

Ann Mei earned a B.S. in computer science from Stanford University and is a member of the Aspen Institute’s Henry Crown Fellows class of 2011.

Role: Chief Executive Officer

As a new CEO, I have had the rare luxury of inheriting not only a financially sound organization, but one with the ability to make major investments in our future to deliver on our mission.

MacKenzie Scott

Role: Major Donor

Dan Jewett

Role: Major Donor

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.

1. Products

Make it easy for people to finding the information they seek

Integrated product suite ~ To deliver on Candid's 2030 vision, we must address what we know to be true: people have difficulty finding the information they seek amidst our plethora of tools, products, and services.

1.1. Simplification & Unification

Simplify and unify Candid's offerings

Our plan is to simplify and unify Candid's offerings so that our 525,000 monthly users can, in one place, search and vet nonprofits globally, identify potential sources of funding, and gain insight on broader trends—making the social sector more equitable, efficient, and effective.

Performance Indicators

1.1.1 Users

Description	Type	Status	Start Date	End Date	Number per Month
Unspecified	Target		2022-06-15	2025-06-15	
	Actual	Baseline	2021-06-16	2022-06-15	525,000
	Actual		2024-06-16	2025-06-15	525,000

1.1.2 Spending

Description	Type	Status	Start Date	End Date	Million Dollars
We will be spending \$9M of your grant over three years to build a state-of-the-art technology platform that brings together key features of our flagship products such as Foundation Directory, GuideStar/Charity Check, Seals of Transparency, 990 Finder, Philanthropy News Digest, Candid Learning, Foundation Maps, and more.	Target	Invested	2022-06-15	2025-06-15	9
These flexible funds have enabled us to not only invest in the development of a robust new platform, but to also support our existing products in parallel so we can	Actual	Ongoing	2022-06-15	2025-06-15	

Description	Type	Status	Start Date	End Date	Million Dollars
continue to provide vital resources to the millions of changemakers who rely on us.					
TBD	Actual		2022-06-16	2025-06-15	

1.1.3 Product Suite

Description	Type	Status	Start Date	End Date
Once deployed, the new suite will simply become Candid.org, with free access to the vast majority of our data, information, and insights.	Target	Freely Accessible		
TBD	Actual			

1.2. Technology

Transition to a consistent, modern technology stack

While not externally visible, equally important will be our transition to a consistent, modern technology stack that will speed up our future product development.

Performance Indicators

1.2.1 Product Development

Description	Type	Status	Start Date	End Date
Speed up product development	Target	Accelerated		
TBD	Actual			

1.2.2 Tech Debt

Description	Type	Status	Start Date	End Date
This will free Candid from the crush of “tech debt” we’ve accumulated over many years, across numerous disparate systems, and give us the opportunity to leap ahead as new opportunities emerge.	Target	Reduced		
TBD	Actual			

2. Innovation

Test and validate new ideas

Stakeholder(s)

Nonprofits

Role: Apply Innovations

2.1. Funding

Establish the Candid Innovation Fund

The Candid Innovation Fund ~ We are also investing \$500,000 to establish the Candid Innovation Fund, which will be deployed to test and validate major new ideas from staff for products, features, services, and markets over the next three years.

Stakeholder(s):

Candid Staff

Role: Ideation

Offer new ideas for products, features, services, and markets

Performance Indicators

2.1.1 Innovation Fund

Description	Type	Status	Start Date	End Date	Dollars
Unspecified	Target		2022-06-15	2025-06-15	
	Actual	Ongoing	2022-06-15	2025-06-15	\$500,000.00
	Actual		2022-06-16	2025-06-15	\$500,000.00

-

2.2. Solutions

Test new solutions and identify those with the greatest potential

Performance Indicators

2.2.1 Potential Solutions

Description	Type	Status	Start Date	End Date
Our intent is to test a wide range of bold new solutions and identify those with the greatest potential before placing a big bet.	Target	Tested		
TBD	Actual			

-

2.2.2 Additional Investment

Description	Type	Status	Start Date	End Date	Dollars
For those that demonstrate the strongest potential for impact, we'll consider larger investments from the remainder of your gift.	Target	Amount Unspecified			
TBD	Actual				\$0.00

3. Staff

Protect and reward our staff

Stakeholder(s)

Candid Employees

Role: Service Delivery

And, despite enormous personal and professional stress, they continued to deliver data, resources, insights, and

training to our colleagues across the sector, supporting their work at a crucial time.

Taking care of our staff ~ When Candid pivoted to fully remote work in March 2020, we could not have predicted the length and impact of the pandemic, or how it would affect our staff. Throughout the pandemic, we saw the wellness and safety of our team as a top priority.

3.1. Bonuses

Provide bonuses

To show our appreciation for their dedication and hard work in this time of crisis, in November 2021 Candid provided a flat \$2,000 grossed-up bonus for every full-time employee (except for the President), as well as a \$1,000 bonus for every part-time employee.

Performance Indicators

3.1.1 Bonuses Paid to Full-Time Employees

Description	Type	Start Date	End Date	Dollars
	Target			
to each full-time employee	Actual			\$2,000.00

-

3.1.2 Bonuses Paid to Part-Time Employees

Description	Type	Start Date	End Date	Dollars
	Target			
to each part-time employee	Actual			\$1,000.00

-

3.1.3 Total Sum of Bonuses Paid

Description	Type	Start Date	End Date	Dollars
	Target			
Unreported	Actual			\$0.00

-

4. Additional Needs

Better serve the needs of the sector

Stakeholder(s)

Philanthropic Sector

Role: Philanthropy

Looking forward ~ Alongside these investments, we are also taking a hard look at other ways we can better serve the needs of the sector.

4.1. Marginalized Organizations

Bridge gaps in affordability, awareness, capacity, and social capital

At Candid, we believe that all organizations, particularly those who have been historically marginalized, should be able to fully benefit from our offerings. Thus, we are actively working to bridge gaps in affordability, awareness, capacity, and social capital.

Stakeholder(s):

Marginalized Organizations

Performance Indicators

4.1.1 Foundation Directory

Description	Type	Access	Start Date	End Date
Offer access to Foundation Directory Essential	Target	Accessible		
One example is our offer for free access to Foundation Directory Essential to nonprofits with a budget under \$1M who earn a Gold Seal of Transparency.	Actual	Free to Qualified Nonprofits		

4.2. Data

Make our data more open and accessible

In addition, we are working to make our data more open and accessible.

Performance Indicators

4.2.1 Performance Data

Description	Type	Status	Start Date	End Date
Share nonprofit performance data	Target			
We recently launched a feature that enables any nonprofit that earns a Seal of Transparency to share their data freely with anyone they choose.	Actual	Freely Shareable		

4.3. Equity

Support equity initiatives

And we are embarking on a sector-wide campaign to support equity initiatives by updating our demographic survey, collecting data in a reusable form, and making it publicly and freely available.

Stakeholder(s):

Demographic Groups

Performance Indicators

4.3.1 Survey

Description	Type	Status	Start Date	End Date
Update our demographic survey	Target	Updated		
TBD	Actual			

4.3.2 Data

Description	Type	Status	Start Date	End Date
Collect data in a reusable form	Target	Reusable		
TBD	Actual			

4.3.3 Access

Description	Type	Status	Start Date	End Date
Make our demographic data publicly and freely available	Target	Publicly & Freely Available		
TBD	Actual			

Administrative Information

Start Date: 2021-06-15

End Date: 2022-06-15

Publication Date: 2022-06-15

Source: <https://blog.candid.org/post/an-open-grant-report-to-mackenzie-scott-and-dan-jewett/>

Submitter:

Given Name: Owen

Surname: Ambur

Email: Owen.Ambur@verizon.net

Phone:

_e240eaae-ed1c-11ec-ae0a-e9e91a83ea00

PDF formatted using TopLeaf XML publisher

www.turnkey.com.au