Kresge Library Instruction
Power User Session: Guidestar

Guidestar Basics

Why use Guidestar?
- Research individual nonprofit organizations in the United States.
- Search by any characteristic of an organization.
- Seek out peer institutions by just about any criteria.
- Find IRS 990 annual reports for non profits, the most offered from any database offered at the University of Michigan.
- Find board members and officers at American nonprofits.

Contains data for over 1.7 million nonprofit organizations in the United States including:
- Revenue tables
- Expense tables
- Balance sheets
- Organization overview (mission, audience, etc.)
- Annual reports (IRS 990s), typically from 1997 to the present
- Lists of officers and other key personnel
- Search by: keyword, location, type of nonprofit, IRS Subsection (e.g., 501(c)(3)), NTEE (National Taxonomy of Exempt Entities) codes, and income.

Searching in Guidestar (Nonprofit Search)

Keyword Searching Hints
- Field may be blank - to find nonprofits by chosen criteria such as location, income, etc.
- May include quotes for phrases (e.g., “historical society”)
- May include wildcards:
  - Use a “?” to replace one character in a word (e.g. to search for either woman or women, use: “wom?n”)
  - Use a “*” to replace characters at the end of the word (e.g. to search for autism, autistic or autistics, use: “autis*”)
- Keyword searches use many fields, but do not include personnel (e.g., directors, board members, officers).
- Excluding words with Keyword searches allows you to narrow a search by removing entries. (e.g. to search for scouts, but not boy scouts, use: “scouts –boy”)
Organization Name/Location
- **Name** can either be keyword or the start of the name. Useful for larger organization (e.g., “American Red Cross”) or one with many chapters.
- **City** can either be keyword or the start of the name.
- **State** searches can include multiple names (use CTRL and click on the different states).
- **Zip Code** searching includes the ability to extend the search to 5, 10, 25, and 50 miles radius from that location. (NOTE: If there are more than 280 zip codes in the radius (urban areas), then the results will be derived from a sampling of all zip codes in that area.)

Organization Details

**EIN (Employer Identification Number) or tax number**
- Use if you already have the number.

**MSA (Metropolitan Statistical Area)**
- Can be sorted by city name OR state
- Does not include Micropolitan Statistical Areas (for example, Adrian & Mt. Pleasant, MI…typically cities of less than 150,000 people.) For these searches, use zip codes with a selected mile radius.

Categories (Guidestar Assigned)
- Can be too limiting
- Only one for each organization

NTEE Code
- From National Taxonomy of Exempt Entities
- Classification System developed by The National Center for Charitable Statistics
- Can search one NTEE Codes at a time
- Some organizations have multiple values, other, (especially smaller organizations) have no entry
- Searching sub-categories does not imply you are searching full categories – Searching for G80 (Specifically Named Diseases) will not include G84 (Autism)

*For more on NTEE codes, see:*
Guidestar’s list of codes: [http://www.guidestar.org/npo/ntee.jsp](http://www.guidestar.org/npo/ntee.jsp)
Search NTEE codes: [http://nccsdataweb.urban.org/PubApps/nteeSearch.php](http://nccsdataweb.urban.org/PubApps/nteeSearch.php)
IRS Subsection

- Section of IRS Tax Code for different types of Non-Profit Organizations
- Many are 501(c)(3)
- Search window lets you differentiate types of 501(c)(3) organizations:
  - All Subjection Codes
  - Public Charities
  - Private Operating Charities
  - Private Non-operating Charities (primarily foundations)

For more on IRS Subsections, see:
Chart listing IRS subsection (Guidestar): http://www.guidestar.org/help/501c_orgs.jsp

Most common IRS Subsections:
- 501(c)(1) - Corporations Organized under Act of Congress (including Federal Credit Unions)
- 501(c)(2) - Title Holding Corporation for Exempt Organization
- 501(c)(3) - Religious, Educational, Charitable, Scientific, Literary, Testing for Public Safety, to Foster National or International Amateur Sports Competition, or Prevention of Cruelty to Children or Animals Organizations
- 501(c)(4) - Civic Leagues, Social Welfare Organizations, and Local Associations of Employees
- 501(c)(5) - Labor, Agricultural, and Horticultural Organizations
- 501(c)(6) - Business Leagues, Chambers of Commerce, Real Estate Boards, Etc.
- 501(c)(7) - Social and Recreational Clubs
- 501(c)(8) - Fraternal Beneficiary Societies and Associations
- 501(c)(9) - Voluntary Employees Beneficiary Associations
- 501(c)(10) - Domestic Fraternal Societies and Associations
- 501(c)(14) - State Chartered Credit Unions, Mutual Reserve Funds
- 501(c)(19) - Post or Organization of Past or Present Members of the Armed Forces
- 501(c)(23) - Veterans Organizations (created before 1880)

Income Range
- All income values are searched by default
- Useful for narrowing down results to larger organizations
- Can select multiple values (CTRL+click)
- Double check search results to ensure that you have not removed entries that would have matched the criteria.

---


2 Taken from listing of IRS subsections on Guidestar: http://www.guidestar.org/help/501c_orgs.jsp
Working with Search Results

Results Screen
- Search results (number of records found) are at top of the screen.
- Search criteria at top-right of the screen.
- Search results are listed in “relevancy ranking” as a default.
- Ability to sort results by criteria shown above. Two useful sorts are income (e.g. to bring larger organizations to the top of the list) and NTEE code (e.g. to bring like organizations together).

Using the ‘Your Search’ and ‘Refine by Category’ Sidebars

‘Your Search’
- This shows the terms that you typed or selected.
- To remove a search limit, just click on the “x” for that term.

‘Refine by Category’
- This shows your result set broken down by these different variables.
- To refine by terms in these categories, click on the “+” next to the category (City, IRS Subsection, etc.)
- Then click on the term that you are interested in.
- If you want two or more entries, re-run the search

Hint: If a new search yields no hits, make sure that some limits are not still checked.
Links from the browse display
- Title of the organization goes to the full record
- Documents entry goes to most recent 990 report available at Guidestar
- IRS Subsection entry goes to the IRS help document (description of the nonprofit)
- NTEE Code entry goes to the list of codes, not to other records with the same mission.

More Hints
- Guidestar states the source for the income in the browse display or general information. The data is either from the IRS 990 or (if it is waiting for a current document) from the IRS Business Master File.
- Many chapters of full organizations are listed as well as the parent organization. You typically can find the parent organization by sorting on Income.

Organizational Full Record entry
- Information available for these organizations varies depending on what they are required to submit to the IRS. Larger organizations will have more information available.
- Main categories are available from the top of the record

General Information
- IRS Subsection Codes (such as 501(c)(3))
- NTEE Codes
- Tax Number (EIN)
- Basic Information (if available)

People
- Lists of names, titles and salaries for the board of the directors, officers of the organization and other key staff.
- When available, you may follow links to older year’s information.
- Names are hyperlinked to other organizations. Please remember that if the names are spelled or constructed differently by different organizations, the links will not find all entries.

Guidestar states the source for the income in the browse display or general information. The data is either from the IRS 990 or (if it is waiting for a current document) from the IRS Business Master File.

Many chapters of full organizations are listed as well as the parent organization. You typically can find the parent organization by sorting on Income.

Organizational Full Record entry
- Information available for these organizations varies depending on what they are required to submit to the IRS. Larger organizations will have more information available.
- Main categories are available from the top of the record

General Information
- IRS Subsection Codes (such as 501(c)(3))
- NTEE Codes
- Tax Number (EIN)
- Basic Information (if available)

People
- Lists of names, titles and salaries for the board of the directors, officers of the organization and other key staff.
- When available, you may follow links to older year’s information.
- Names are hyperlinked to other organizations. Please remember that if the names are spelled or constructed differently by different organizations, the links will not find all entries.

Guidestar takes a few months to process incoming 990 reports. Some organizations post older and more recent 990s on their website (e.g., http://www.npr.org/about/privatesupport.html)
Goals and Results
- Brief statements about the mission of the organization and recent accomplishments
- Information should be verified and might be too narrowly phrased to describe the full activities of the organization

Form 990 and eDocs
- Includes previous IRS 990s that are available on the site.
- Not all non-profits need to file 990s.
- Guidestar hosted 990s typically, they go back to 1997.
- Great document on how to read a 990 report (from the nonprofit coordinating committee of New York): [http://www.npccny.org/Form_990/990.htm](http://www.npccny.org/Form_990/990.htm)

Financials
- Data is pulled from the IRS 990 reports or IRS Business Master File.
- Financial information is not available for all organizations.

Searching in Guidestar (People Search)

People Search Hints
- Provides the ability to search for board members and officers at American nonprofits
- People are listed for each nonprofit they are associated with.
- Individual names may not be consistent from organization to organization.
- Search by Organization Name/Location:
  - Organization Name
  - City
  - State
  - Zip (with ability to extend search select miles from Zip code)
- Organization Details
  - EIN
  - Categories (assigned by Guidestar)
  - Income Range

Search Results
- People search results include all entries listed individually.
- Results can be sorted by Relevancy (default) or organization name.
- Links to the record will show that person’s role (and others) within the organization.
People Search Record

- Full record includes a link to the organizational record.
- Includes role for that organization (responsibility); salary and other financial information if applicable.
- Lists other people in the organization.
- To view other organizations for that person, you need to run an additional search.
- If a person has multiple roles in different organizations, they will each appear on its own line in the search results.

Other Resources for Nonprofits

Additional Resources from Guidestar

- Links to the GuideStar home page are on the bottom right of each page.
- You can find:
  - Articles by GuideStar staff and others about nonprofit issues
  - Guidestar Monthly Newsletter covering the nonprofit environment and dating back to 2002

Resources on Foundations and Grants (from University Libraries)
http://www.lib.umich.edu/grad/guide/guide.php?id=84

Resources on Nonprofits (from Michigan’s Nonprofit and Public Management Center)
http://www.nonprofit.umich.edu/nonprofits/resources.php

OneSource (another good resource for Nonprofit Information and News)
http://www.bus.umich.edu/KresgeLibrary/secure-all/one/