

Kresge Library Instruction Researching Nonprofit Organizations

Kresge Library Databases for Researching Nonprofits

Primary Databases

Guidestar

http://www.bus.umich.edu/KresgeLibrary/GotoResource.asp?158

ABI/Inform (ProQuest)

http://www.bus.umich.edu/KresgeLibrary/GotoResource.asp?18

OneSource (Ross Access Only)

http://www.bus.umich.edu/KresgeLibrary/GotoResource.asp?142

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.

Why use ABI/Inform (ProQuest)?

- Ability to find news about nonprofit organizations
- Great resource for articles about nonprofit management and general issues

Why use OneSource?

- Research larger individual nonprofit organizations in the United States.
- Ability to find "corporate family" great for health organizations
- Ability to find news and executives for these organizations
- Ability to find peer organizations

Other Kresge Library Databases to Consider:

- IBISWorld Wide coverage of US organizations in reports such as Community Housing Services in the US & Grantmaking and Giving Services in the US
- Business Source Complete (EBSCO) Excellent general resource (similar to ABI/Inform) with articles on nearly every subject
- LexisNexis Academic Excellent general resource (similar to ABI/Inform) with articles on nearly every subject
- Dun & Bradstreet's Million Dollar Database Good resource for directory information and
- **JSTOR** Online archives of leading academic journals with full-text searching remember that it typically does not cover the past few years

New Resource - Kresge Library Wiki

A growing resource that includes a page for nonprofits, see:

http://webservices.itcs.umich.edu/mediawiki/KresgeLibrary (main page)

http://webservices.itcs.umich.edu/mediawiki/KresgeLibrary/index.php/Nonprofit_Resources

Guidestar Basics

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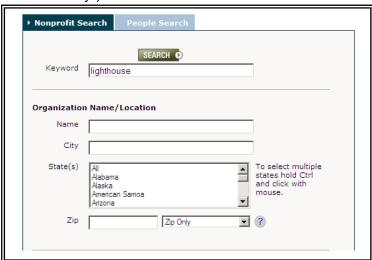
Contains data for over 1.7 million nonprofit organizations in the United States including:

- 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)

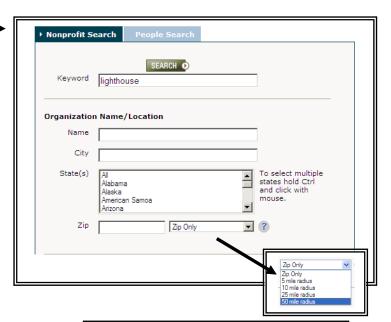
Keyword Searching Hints

- 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, Ml...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

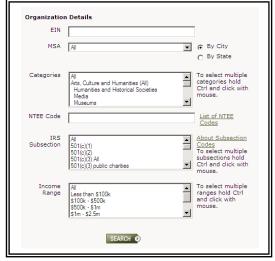
NTEE Code

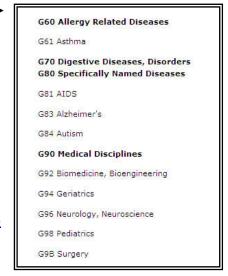
- From National Taxonomy of Exempt Entities
- Classification System developed by The National Center for Charitable Statistics
- Can search one NTEE Codes at a timeh.
- Some organizations have multiple values, other, (especially smaller organizations) have no entry
- Searching sub-categories does not 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 Search NTEE codes:

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)

The following chart lists the different kinds of tax-exempt organizations and whether or not contributions to them are tax deductible. It is based on <u>IRS Publication 557</u> and <u>T.D. 8818</u> . For more information, see IRS Publication 557 and T.D. 8818 or consult your tax advisor.				
Section of Code	Description of Categories	Annual Return Required to Be Filed	Disclosure Requirements	Contributions Allowable
170(c)(1)	Government Entity	None	None	Yes, if made for exclusively public purposes
501(c)(1)	Corporations Organized under Act of Congress (including Federal Credit Unions)	None	None	Yes, if made for exclusively public purposes
501(c)(2)	Title Holding Corporation for Exempt	Form 990 ¹ or 990-EZ ⁸	Form 990 or 990-EZ Form 1024	No ²

For more on IRS Subsections, see:

Chart listing IRS subsection (Guidestar): http://www.guidestar.org/help/501c orgs.jsp
IRS Document on Nonprofits¹: http://www.irs.gov/pub/irs-pdf/p557.pdf
IRS Information for Charitable Organizations: http://www.irs.gov/charities/charitable/index.html

Most common IRS Subsections²:

- 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)

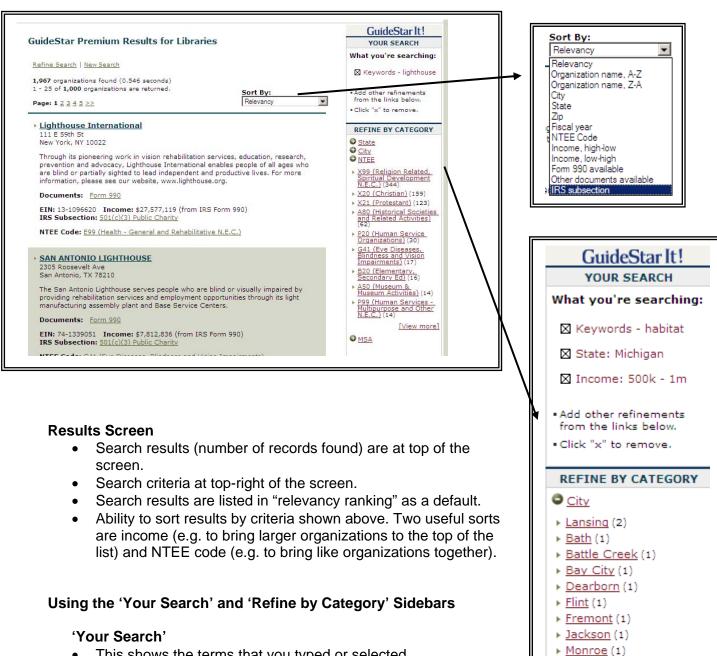
Income Range

- 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.

¹ Tax-Exempt Status for Your Organization (IRS Publication 557). HTML version of the same document is available at: http://www.irs.gov/publications/p557/index.html

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

Working with Search Results



- 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.

► Muskegon (1)

IRS Subsection

☑ NTEE

[View more]

Links from the browse display

- <u>Title</u> of the organization goes to the full record
- <u>Documents</u> entry goes to most recent 990 report available at Guidestar³
- 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.



GUIDESTAR PREMIUM REPORT FOR LIBRARIES General Information

Mission at Programs

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.

Also Known As: ASA

7910 Woodmont Ave Ste 300 Bethesda, MD 20814

Contact:

Web Site:

Who We Are

Ms Tiffany Gill, De

(301) 657-0869 cfolsom@autism-society.org

This organization is a 501(c)(3) Public Charity .

This organization is required to file an IRS Form 990 or 990-62.

www.autism-society.org

The Autism Society of America endeavors to improve the lives of individuals with their families, and the professionals who work with them by providing services, information, education, advocacy, and public awareness.

Financial information in this report is derived from the organization's December 31, 2005
 Form 990.

 Additional narrative information in this report was last supplied by the organization on December 4, 2006.

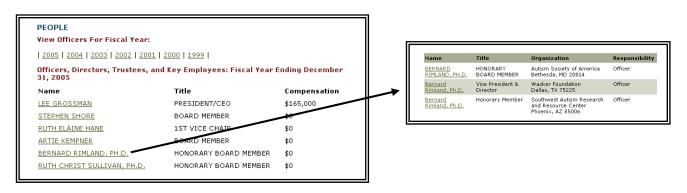
Main categories are available from the top of the record

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.



³ 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)

http://www.bus.umich.edu/KresgeLibrary kresge_library@umich.edu

Researching Nonprofit Organizations (updated January 29, 2008)

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

Financials

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

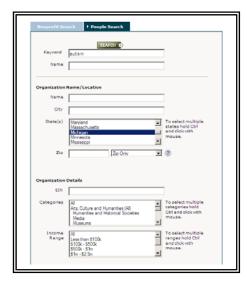
Searching in Guidestar (People Search)

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
 - Citv
 - 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.

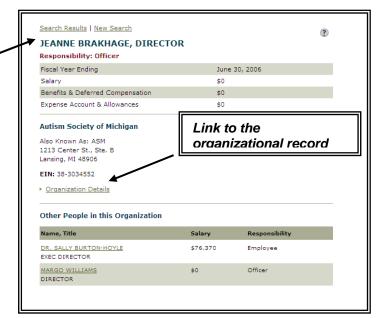






People Search Record

- 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:
 - o **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

Using ABI/Inform (ProQuest) for Nonprofit Research

Why use ABI/Inform (ProQuest)?

- Ability to find news about nonprofit organizations
- Great resource for articles about nonprofit management and general issues
- Database is extremely current in regards to news articles

Searching for Specific Nonprofit Organizations

- Search under keyword for the name of the organization
- For larger organizations, the heading will show up as well (Habitat for Humanity (company/org)) click on this to get articles specifically about this organization
- While many smaller organizations will be in Guidestar, they may not show up in ProQuest
- Entries will be found searching the description and full text of the articles
- Some nonprofit organizations (United Way for example) will yield many results use the suggested topics to narrow the results



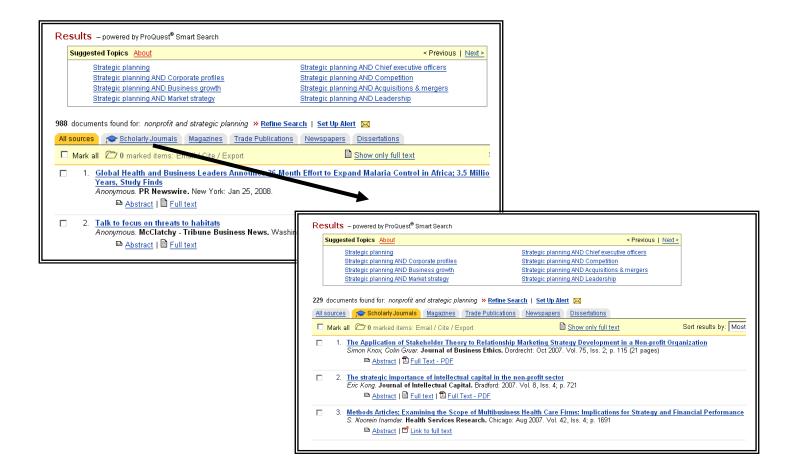
4. In Hot Water Gaule Ehrenmen. Mechanical Engineering. New York: Apr 2004. Vol. 126, Iss. 4; p. 22 (1 page)

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Abstract |
 Link to full text

Searching for General Articles on Nonprofit Organizations

- Search under keyword for the concepts you are looking for
 - Nonprofit and strategic planning
 - Nonprofit and case studies
- Use the suggested terms to help narrow your search



Saving that search strategy as an alert

- Next to search strategy, click on: "Set Up Alert"
- Send emails based on your specs
- Will expire in as long as one year, but can be deleted anytime

Results

34 documents found for: (SIC(5731) and WC(>2500)) AND PDN(>11/8/2005) → Refine Searci | Set Up Alert 区

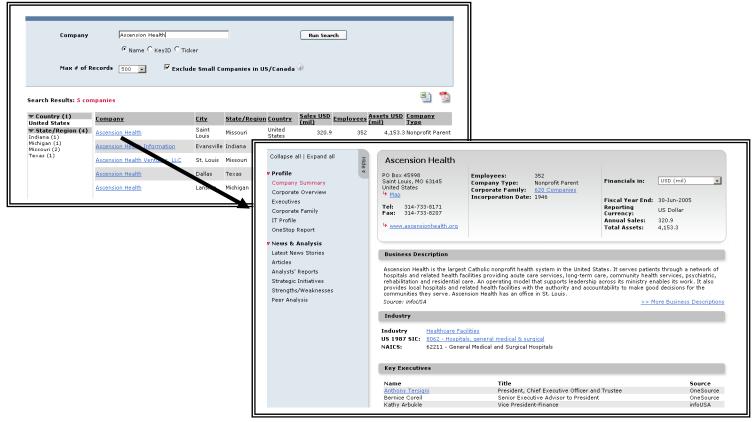
Using OneSource for Nonprofit Research

Why use OneSource?

- Research larger individual nonprofit organizations in the United States.
- Ability to find "corporate family" great for health organizations
- Ability to find news and executives for these organizations
- Ability to find peer organizations

Search for an Organization

- Most larger nonprofit organizations are covered by OneSource
- Financial data comes from Guidestar
- You can do a keyword search OR choose 'nonprofit' as an option under ownership on the advanced search



Organization Entries (on left hand side of the screen):

Company Summary: provides a summary of the information in the database **Corporate Overview:** provides a descriptive overview of their operations

Executives: shows key board members and officers at the organization

Corporate Family: shows the connected organization – maybe branches or affiliate members

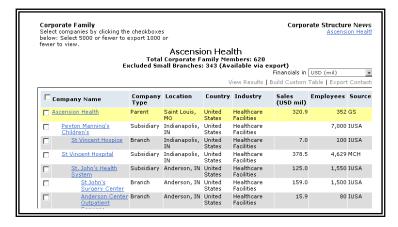
OneStop Report: Allows you to easily print and/or save profile information and news from a company – this is saved as a PDF document

News and Articles: Articles from various news resources – many are similar to those from ProQuest

Peer Analysis: Allows you to find similar organizations by almost any criteria

Corporate Family

- Not all nonprofit organizations have a corporate connection to affiliates
- Very useful for organizations like Habitat for Humanity
- If the Corporate Family option does not display, then they are a private independent



Executive Report

- Allows you to see Executives and Board Members
- Many people, but not all, have 'Web Bios'
- They vary a great deal depending on the available information



Peer Analysis

- Can be used to find peer organizations across the country
- Can limit to a variety of search terms (NAICS, SIC, Location, Employees)
- Can find any number of peer organizations (20 is the default)

