

Instructions for Updating Your Candid Account with Demographic Information

If your organization has a Candid profile:

1. [Log in to your Candid account.](#)
2. Review and update, at minimum, the race/ethnicity, gender and transgender identity, sexual orientation, and disability status of your leadership, staff, and board. In all instances, your team may choose 'decline to state' if they prefer not to disclose any demographic information.

If your organization does not have a Candid profile:

1. Access the [Claim Form](#): Visit the Candid website and locate the form to claim your organization's profile.
2. Complete the Form: Fill in all the required information about your organization as prompted.
3. Submit!

If your organization is fiscally sponsored:

The sponsored organization will fill out demographic information in your grantee portal. To do this, please log in to your grants portal [here](#), go to your Organization Profile, and scroll down to where you see the Demographics tab. There you will provide demographic information for the race/ethnicity, gender and transgender identity, sexual orientation, and disability status of your leadership, staff, and board below. In all instances, your team may choose 'decline to state' if they prefer not to disclose any demographic information. Senior staff includes the leader and co-leader and is defined as people with the authority over budget. Typically this includes C-suite staff like VPs and, depending on the structure of the organization, may include directors. As a non-EIN organization, your board might be an Advisory Board, Leadership Council, or another entity independent of your organization.

Feel free to reach out to grants@headwatersmt.org with any questions or trouble.

If your organization is a school, university, government entity, or Tribal entity:

You will fill out demographic information in your grantee portal. To do this, please log in to your grants portal [here](#), go to your Organization Profile, and scroll down to where you see the Demographics tab. There you will provide demographic information for the race/ethnicity, gender and transgender identity, sexual orientation, and disability status of your leadership, staff, and board below. For this data, please only include the team closely aligned with this project (e.g. - advisory committee, department heads, community council, a particular person leading the project, etc.). In all instances, your team may choose 'decline to state' if they prefer not to disclose any demographic information. Senior staff includes the leader and co-leader and is defined as people with the authority over budget. Typically this includes C-suite staff like VPs and, depending on the structure of the organization, may include directors. As a non-EIN organization, your board might be an Advisory Board, Leadership Council, or another entity independent of your organization.

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If you need assistance collecting or sharing your data:

Check out these resources:

- [Candid Demographic Data Collection Guide](#)
- [Collecting and Sharing Demographic Data via Candid](#)

If you need assistance using the Candid interface:

Contact Janet Camarena at Candid - janet.camarena@candid.org.