

Businesses Strengthening Communities

A Tool Kit for Building Successful
Giving Programs



A SUPPLEMENT TO THE BOSTON BUSINESS JOURNAL

It has been said that a society with the collective will to constantly improve also has an underlying responsibility to help people achieve their own limitless potential.

Businesses Building Stronger Communities

Local businesses know that community presence is key to their success. Companies of all sizes have seen that a corporate giving program enhances reputation, leverages employee retention and helps build a healthy economy in which everyone benefits.

Social responsibility and community involvement are becoming the hallmark of our region's strong companies — large and small — as they realize it is incumbent upon business to stand up, get involved, and make a real difference in the lives of children, families and individuals in Massachusetts. By planning involvement, by being intentional and strategic, companies are able to develop programs that not only help build business but also strengthen the very society in which they operate.

Associated Grant Makers, Boston Business Journal, Inc., The Boston Foundation, The Philanthropic Initiative, Inc., and United Way of Massachusetts Bay have collaborated to create this tool kit and resource guide to help businesses impact community through successful corporate giving. Our shared goal is to help companies create lasting programs that align company vision and employee interest with community needs for the betterment of society today and long into the future.

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Every corporation is a citizen — an economic and social force touching many stakeholders. Increasingly, customers, employees, business partners and government demand that corporations take an active role in social, environmental and community concerns. That's why strategic corporate citizenship is more than good business — it's a business essential.

”

— The Center for Corporate Citizenship at Boston College

chapter 1 doing well by doing good

A good giving program can help support your corporate mission — and enhance your bottom line.

But giving is not always easy, especially for businesses that do not have resources dedicated to the growing number of charities requesting their help. In every organization, there is a leader — a CEO, manager, employee — who can shape the company culture toward an effective giving program. Whether your organization currently handles requests from community groups on a case-by-case basis, donates more products and services than cash, or has not yet set up a giving program, this tool kit can help your company give more effectively and with greater impact.

This tool kit will take you through the steps of creating, organizing and improving your giving program. It includes case studies, worksheets and additional resources that will make your giving program a powerful way of fulfilling your company's mission.

The case studies included in this tool kit feature local companies whose leaders have organized their giving programs to both help their communities and grow their businesses. By establishing philanthropic practices that work for your company, you can reap the rewards of being a good corporate citizen — building a better community and a stronger company.

this tool kit will assist you in:

- Educating your employees on the merits of community outreach
- Identifying opportunities for serving the community
- Developing a corporate giving strategy
- Defining corporate outreach and giving opportunities that work best for your company
- Evaluating the most appropriate avenues of engagement for your business with worksheets and assessment tools

U.S. SMALL BUSINESS ADMINISTRATION

Businesses with 500 employees or fewer represent 98% of Massachusetts employers.

76% of consumers indicate they would switch brands or retailers to one associated with a good cause, when price and quality are equal.

1999 CONE/ROPER CAUSE-RELATED TRENDS REPORT

chapter 1 doing well by doing good

giving wisely

For some companies, the old model of “checkbook charity” — contributing money to a good cause on an ad hoc basis — has yielded to giving programs that tie donations of time, money and gifts-in-kind to defined business goals and desired benefits. Your business can join the many small and mid-sized companies that have reaped the market share, human resource, and public relations advantages that this approach offers.

Other companies see a clear connection between their fiscal health and the health of the communities in which they do business. Corporate giving in this case is not just a matter of conscience; it is also a matter of understanding the fundamental congruence between business functions and community goals.

Whatever your giving philosophy, this tool kit provides a framework for developing a giving program that will benefit you, your employees and your community, and will help you decide where to give, what to give and how to give wisely.

the bottom-line benefits of giving are far-ranging and include:

- Competitive advantage in attracting and retaining employees
- Closer relationships with community leaders and officials
- Greater customer loyalty
- Increased positive name recognition and brand awareness
- Leadership development opportunities for employees
- Enhanced reputation and standing in the community
- Beneficial business-to-business relationships with nonprofits
- A reservoir of goodwill within the community that can serve a company in a time of crisis
- Improved internal communications and sense of common purpose
- Exposure of staff to new ideas, points of view and important social movements
- Healthier, more livable and economically stronger communities

There are many resources and models available to help you design a program that’s just right for your business.

chapter 1 doing well by doing good

case study: IPSWITCH, INC.

THE IPSWITCH GIVING STORY: DOING WELL BY DOING GOOD

Ipswitch is committed to serving as a leader in corporate community involvement. As the company grows, so does its commitment to community involvement.

Ipswitch was founded in 1991 with the underlying objective to develop and sell software that makes the benefits of technology accessible to a broad audience. Since 1991, the company has donated millions of copies of its WS_FTP LE file transfer software to students and educational institutions, and recently has made available IMail Express, a free version of Ipswitch's popular e-mail server.

In 1999, Ipswitch launched a charitable giving program by donating \$55,000 to eight organizations nominated by employees. Since 1999, the Ipswitch commitment to charitable giving has become larger and more focused. The company donates 5% of profits to community involvement. In 2003, Ipswitch selected child poverty as its primary focus for giving. Child poverty is a compelling fit for Ipswitch because it is a practical and moral issue that reinforces company values, it reflects the highest areas of interest of employees and business partners, and it is a global issue that affects people in all countries in which Ipswitch sells its software.

The business impact of community involvement at Ipswitch has been both tangible and intangible. Increasing evidence suggests that community relations has contributed positively to the Ipswitch culture, reputation, and strength of relationships with business partners, customers and employees. Job candidates frequently mention community involvement as an important part of why they would like to work at Ipswitch. In addition, several cause-related marketing programs with customers and business partners have led to measurable short-term sales increases, ranging from 15% to over 100% in some programs.

Community involvement is an integral part of the Ipswitch culture, values and management philosophy. Ipswitch intends to continuously refine and build upon its current approach to corporate philanthropy in a sustained effort to maximize the impact of company involvement.

chapter 1 doing well by doing good

case study: WAINWRIGHT BANK

FOR WAINWRIGHT BANK, BUSINESS IS A LOT MORE THAN BANKING.

When even customer complaint letters begin with, "I just love your bank ...," you really begin to appreciate what is meant by "doing well by doing good." For Steve Young, SVP of Consumer Banking, who, along with Wainwright Bank founder and co-chairman Bob Glassman, established the bank's social justice initiative, it is an affirmation of a decision made 12 years ago to put the nonprofit community at the center of their business — a decision that has yielded significant business-building results. Young estimates that 25 to 30% of their customers work with them because of their reputation as a bank with a social mission.

That reputation was earned by taking to heart their community development strategy and fostering an environment where it was allowed to take root in every facet of the business. Wainwright Bank is the only local bank with a product line designed especially for nonprofits, and as much as 40% of its commercial loans go to nonprofits — in an industry where 1% is typical.

Beyond its product development and investment strategy, Wainwright Bank created an environment that supports the nonprofit community's growth efforts. Over half of its branches have community rooms open to nonprofits for meetings after business hours. What's more, it has created a virtual nonprofit community on its website called CommunityRoom.net. Over 140 nonprofits use the site where they receive free web-hosting services and can accept donations directly to their individual organizations. In 2003, CommunityRoom.net donations reached \$250,000, double that of the previous year, and — based on this year's first-quarter results — they will double yet again in 2004. For prospective donors, the site not only allows flexibility in giving, it also creates giving histories that make it easy for individuals to keep track of their donations.

Because Wainwright Bank has made its social development program fun and easy, it appeals to customers and employees alike. "Employees join the bank because people know who we are and know that employees are #1 — that is why they want to work here," says Young. "Our retention is very high. We have certainly found that, if you make your employees happy, they will make your customers happy and they will stay. At Wainwright, 'banking on values' has real meaning."

chapter 2 types of corporate outreach

A business giving program is your commitment that you will contribute to organizations and causes that are important to you, your business and your community. The program can be as structured or as informal as you like, depending on the size of your business, the level of contributions and the number of participating employees.

FINANCIAL CONTRIBUTIONS

Corporate Gifts

Donations to provide essential financial support needed to sustain and grow community programs

Benefits:

- Allows companies to deduct charitable grants from corporate taxes up to 10% of pre-tax net profits
- Associates companies with specific programs or causes
- Reinforces company mission around community

Donor-Advised Funds (DAF)

Charitable giving vehicles that can be used as a private foundation. A company establishes a donor-advised fund with a public charity, community foundation, financial institution or university, with a minimum gift amount (\$5,000–\$10,000). DAFs are pooled for investment purposes and can be less expensive to administer than a separate private foundation.

Benefits:

- Company receives an immediate charitable tax deduction when the gift is made. It can then make grant recommendations to support its favorite charities on its own timetable.
- Company can name its advised fund for recognition purposes. Contributions can be made and grants recommended in a single account.
- Account activity can be managed and viewed online.

Dollars for Doers

Rewards employees' efforts by making cash grants to organizations in which employees volunteer. (Ex. Company donates \$100 for every 40 hours of volunteer time)

Benefits:

- Encourages employees to volunteer
- Strengthens employee loyalty and company culture

Workplace Campaign and Fund-Raising Events

Employees make donations through payroll deductions or one-time contributions

Benefits:

- Pooling of employee donations creates a powerful giving tool for an organization
- Campaigns provide a human resource tool that allows employees to benefit the community
- Allows for individual employee flexibility within a larger culture of company giving

Challenge Grants and Employee Matching Gifts

Matching donations to encourage additional corporate support around a program or organization that are important to your employees.

Benefits:

- Challenge grants can double or triple the impact of an individual donation
- Organizations take a leadership role to garner individual and business support and create visibility around specific community issues

CONTRIBUTIONS OF EXPERTISE AND SERVICE

In-Kind Contributions/Donations

Contributions of products, supplies, property or excess inventory. Can also include services such as printing, website development and use of meeting rooms

Benefits:

- Complements and expands charitable giving
- Gifts are tax deductible within certain limits

Co-Marketing

Joint advertising, product and service marketing or co-produced events with a community service organization

Benefits:

- Aligns company's business mission with a social mission
- Incorporates community with brand identity

CONTRIBUTIONS OF TALENT

Volunteering and Advising

Opportunities for individuals or groups of individuals to provide community service to programs or advise nonprofits by sitting on a board

Benefits:

- Demonstrates company commitment to community service
- Motivates current employees and attracts employees to company
- Method of team building

Loaned Talent

Contributions of time and expertise of employees, allowing them to help an organization on company time

Benefits:

- Increases employees' leadership skills and understanding of community needs

chapter 2 types of corporate outreach

maximizing outreach programs by engaging employees

Many business owners find that one of the greatest benefits of their business giving programs is the satisfaction and enthusiasm it generates among employees. The following are some ways that businesses support their employees' interest in the community while building employee loyalty and satisfaction:

aligning employees with outreach strategy

Give priority to employee requests

Many businesses prefer to contribute to organizations with which their employees are affiliated, particularly as volunteers.

Invite employees to help with the decision-making

Consider inviting employees to discuss the pros and cons of specific contribution requests. Ask employees about their knowledge of specific agencies, or invite them to help with research or sit on a committee that makes decisions about contributions.

tactics to enhance employee involvement

Offer matching contributions

Some businesses match employee contributions to specific organizations. For example, budget up to \$1,000 for a matching pool for employee donations, and match any employee donation between \$25 and \$50 until you deplete the pool. Or, you may match \$1 for every \$2 of employee contributions.

Invite employees to join a company-wide volunteer effort

Some companies organize volunteer activities for their employees, such as participating in a community clean-up day or tutoring in schools. This can be a good way for the company to engage employees in their favorite projects.

Offer in-kind contributions that show off their work

Businesses sometimes give employees a chance to volunteer their skills and talents, and make a real difference in the community at the same time.

chapter 2 types of corporate outreach

case study: J. JILL

ESTABLISHING A DONOR-ADVISED FUND FOR CORPORATE OUTREACH — THE J. JILL COMPASSION FUND

J. Jill is about women: the women they employ, the women who are their customers and the women across the country who, with their children, are often forgotten or under served. The company has successfully married its community approach to business, the interests of their women customers and the philanthropic goals of its employees. In fact, what it is able to do today has been a direct evolution of its employees' desire for involvement and connection to their community.

It all began over seven years ago when Gordon Cooke, president and CEO, and John Hayes, executive vice president and chief marketing officer, began the first corporate giving program with New York-based Women In Need, Inc. From that start, a number of employees who were interested in helping homeless women sought out Rosie's Place in Boston. Holly Clark, a marketing manager, spearheaded the grassroots effort and today Clark manages J. Jill's corporate giving program.

As J. Jill's business grew — from a catalog company to a national retailer — so did the needs of its philanthropic outreach. Clark explains, "As we moved into customers' communities, it became important to support their neighborhoods. John Hayes challenged me to raise the profile of our philanthropic giving in keeping with our business growth. To us, that meant thinking along the lines of a foundation."

Instead of a traditional foundation, in June 2002 J. Jill turned to The Boston Foundation (TBF) to help establish a donor-advised fund called the J. Jill Compassion Fund. "If we had enough money, we would have had our own foundation, like Avon, but it is expensive and time-consuming," explains Clark. "The donor-advised fund allows us to focus on specific needs, scale our reach and budget our giving."

The administration of the fund is streamlined through TBF, which is important, because Clark's philanthropic work is an added responsibility to her marketing job. "We can rely on the administrator's expertise and network of community foundations nationwide," says Clark. "They do the leg work for a relatively small fee. At the same time, we can be as involved as we want with the organizations receiving our grants. And, from a marketing angle, the Compassion Fund allows us to discuss the good work we are supporting for women, both community by community and from a national standpoint."

Another advantage of the fund is that it is easy to stay focused. "We know we have a certain amount of money in the fund and a defined giving focus. It makes it easier to say 'no' to organizations that support good causes but do not fall within the scope of our giving mission," Clark adds.

The dollars for the Compassion Fund come primarily from the profits of specific products. Last year, for example, J. Jill offered pocket angels and music CDs featuring women artists. Additionally, the J. Jill catalog may, from time to time, carry products created by women within the organizations J. Jill supports. "Product exposure helps get out the message about our fund, and the grant recipients to customers across the country."

chapter 2 types of corporate outreach

case study: PARADIGM PROPERTIES CREATING BUSINESS AND COMMUNITY IMPACT BY APPLYING WHO YOU ARE TO WHAT YOU DO

Paradigm Properties' philosophy, "leverage what you have, take what you learn from community engagement and let it strengthen your own business," is not only the guiding principle behind their philanthropy, it has also helped bolster the organization's growth throughout challenging economic times. The name — Paradigm Properties — speaks volumes about this real estate management company. Paradigm shifts, are, as CEO Kevin McCall is quick to point out, "pretty simple. They make the obvious, obvious. "And for Paradigm, the obvious is to leverage what you have, beginning with clearly articulated values, for community and company benefit.

"When any business is bad," explains McCall, "the default value for a company that does not have clearly articulated values is 'make more money.' But we can never make enough money, so having values that a company, including employees and clients, can build on is key to success. "For Paradigm those values are clear — focus on clients, employees and community.

So how do you leverage your values for community and company benefit? According to McCall, there are two kinds of leverage: intentional and unintentional. "Intentional leveraging is identifying opportunities within the company's relationships with clients, vendors and employees for greater impact. Unintentional leverage, while unexpected, can yield enormous opportunity." Explains McCall, "A tenant in one of our buildings wanted to know if she could extend a pie drive to the entire building. We said, 'yes'. "That simple decision yielded a eureka-like moment. "Instead of just looking to Paradigm's employees for community engagement, we began to look to Paradigm's vendors, tenants and others for greater community engagement," says McCall. Titled Building Impact, the concept of packaging and offering community involvement programs to the tenants of office buildings, was born.

"For example, each month Building Impact focuses on a different community topic and provides building-centric opportunities for issue awareness, volunteering and philanthropy with selected local nonprofit organizations," explains Building Impact director Lisa Guyon. The success of Building Impact is "in its ability to both engage tenants and, more importantly, help them see how they can create meaningful community engagement opportunities for their employees and customers."

And the result? Business-building opportunities for Paradigm tenants. The students of one tenant company, a language school, became very involved in community involvement events hosted by Building Impact, leading directly to a key curriculum change. The language school, seeing the positive benefits that deeper cultural experiences had on their students, created a conversational mentor program to extend their students' experience.

chapter 3 planning a giving program

Part I: Identifying Corporate Values and Giving Mission

“Determine what you want the program to do for you so that you have a strategic focus and clear decision criteria. Are you trying to impact outcomes around a specific community or business issue? Gain positive PR and visibility? Attract or retain customers? Support employee efforts? You will not be able to be all things to all stakeholders — focus is critical to achieving results in the areas you deem important.”

— Meg Woodside, Regional Director of Community Relations and Public Affairs, Comcast

The key to a successful giving program is knowing what kinds of activities and programs you will support — and why. One way to do this is by determining where your company's interests and the community's needs intersect. By clarifying your criteria and informing your employees and your community, you can:

- Reduce time and effort spent deciding which organizations to support
- Respond more easily to solicitations
- Limit the number of unwanted requests
- Ensure that your contributions are used for causes that you care about, in ways that you care about
- Make your contributions more meaningful and effective

Businesses use a variety of criteria to decide how they will distribute their money (as well as time and in-kind contributions) for charitable purposes. The two most important are:

goals

- Why do you want to have a charitable contributions program?
- What do you want to happen as a result of the program?
- How will the program's objectives and successes be related to stakeholders?

desired use of funds

How do you want your money to be used: for ongoing operations, for specific projects or for the creation of something tangible, such as equipment or a building?

Many small and mid-sized companies focus their giving programs on a particular population (i.e., youth, women, Latino, etc.) or specific issues. These needs may fall into such broad categories as education, health and human services, economic development and the arts. Focusing your charitable giving on a particular area will enable your company to make a greater impact with its dollars and, in many cases, have greater alignment with company customers, community and mission.

Note that your goals may change over time as your business grows. None of these ideas is carved in stone. As issues, circumstances and available resources change, you may find that your priorities change, too.

The following worksheet will simplify the identification process and can be used in team discussions as you hone your strategy.

chapter 3 planning a giving program

Part I: Identifying Corporate Values and Giving Mission

worksheet

1. In setting business goals for the coming year, which of the following are the most important to you? Number your top choices 1 through 3.

- Increasing revenue
- Expanding customer base
- Improving customer loyalty
- Improving corporate image in the community
- Attracting, motivating, developing and retaining employees

2. Based on your business goal rankings, how can a giving program complement your objectives?

- Support issues that align with our company's business mission
- Support organizations that represent new markets
- Support organizations that are important to our customers
- Support organizations where employees volunteer or support through individual contributions

3. The issues that align with our goals are:

- Children and youth
- Arts and culture
- Environment
- People with basic needs: food, shelter
- Healthcare issues
- Domestic violence
- Helping the unemployed
- Other _____

4. Do you want your contributions to:

- Create something that is tangible and lasting, such as building an addition to a community center or adding lights to a public ball field?
- Support the ongoing work of local organizations?
- Help start a new project or organization?
- Be used for all three?
_____ % for ongoing operations
_____ % for start-ups
_____ % for lasting projects

5. Do you want to:

- Focus contributions on a few agencies
- Distribute contributions more broadly throughout the community

chapter 3 planning a giving program

Part I: Identifying Corporate Values and Giving Mission

case study: EILEEN FISHER

WOMEN CHANGE THE WORLD EVERY DAY: EILEEN FISHER ALIGNS ITS BUSINESS AND SOCIAL MISSIONS

EILEEN FISHER, a high-end women's clothing designer and retail business, has long had social consciousness (formerly called "social accountability") as a key organizational priority. Although, their efforts were effective, the absence of a formal strategy resulted in the fragmentation of work and impact. So several years ago, the organization created a committee to address internal concerns about piecemeal giving and to create consistency around their corporate outreach.

Today, the committee comprises 10 people representing every facet of the company: finance, advertising, public relations, operations and the retail and wholesale businesses. Their charge is to better align the organization's social and business missions. Their objective is to carry out philanthropic vision by evaluating opportunities and making decisions regarding requests for donations and community-relevant public relations and events. Because they now review requests on the merit of both the business and "feel good" impact, the group has very effectively tightened the organizational giving focus.

Up until September 11, 2001, gifts to the community were primarily made to shelters or women's organizations in close proximity to a store, showroom or office location. But September 2001 created a different way of seeing the world. Eileen Fisher concluded that the world is broader than the communities in which they operate, and she wanted her company to play a larger role among a wider circle of women. The company now supports key national and international organizations providing services for women most in need.

In 2002, EILEEN FISHER adopted a new and powerful advertising campaign using the brand line, "Women Change the World Every Day." Beyond advertising, they found this statement strategically effective for the entirety of their business. As such, they decided to incorporate it with their community mission, ensuring that both community and business work hand and hand. The result has been nearly seamless integration of their community and clothing philosophies — clothing designed around what clothes can do for a person: build self-esteem, offer simplicity and empowerment and simply make one feel good. Going forward, the community mission will continue to reflect the business vision and ensure a unified message across the board.

Corporate outreach at EILEEN FISHER is truly a combination of Eileen Fisher's personal leadership and passions and the direction of the business. As such, it continually evolves and takes on new hues. As Social Consciousness Director, Amy Hall advises companies, "Corporate outreach is an ever-changing process that should be evaluated each year to keep programs dynamic and growing."

chapter 3 planning a giving program

Part I: Identifying Corporate Values and Giving Mission

case study: causemedia, Inc.

WHERE BUSINESS MISSION AND PHILANTHROPIC PASSION BECOME ONE

What does *socially responsible* mean, especially when it comes to business success? To Donna Latson Gittens, founder and CEO of the social advertising agency causemedia, Inc., it means "doing well and doing good." Guided by the philosophy "marketing corporate goals and social issues through the media," causemedia holds a unique niche among the global advertising agencies here in Boston. Even the name — causemedia — is the perfect blend of social cause and communication.

With a successful television career long steeped in innovative, award-winning community programming, Gittens launched causemedia in 1997. "It was those organizational relationships and social approach to programming that I wanted to bring into the business sector," she explains.

"We work with a diverse group of clients, all attracted to causemedia for the same things: the quality of our work, our experience and expertise in social advertising, and our ability to turn corporate visions into operating realities," observes Gittens. causemedia's clients include a mix of large corporations (BlueCross BlueShield of Massachusetts, Boston Red Sox, and Harvard Medical School), small businesses and public agencies, including the Massachusetts Department of Public Health, for which the agency produced the first-of-its-kind anti-tobacco campaign for minority women and girls.

causemedia also takes an integrated approach to business focus and corporate culture. "The work we do is part and parcel of our mission," Gittens comments. "Our personal community interests and initiatives are completely synergistic to our professional efforts." For example, in celebration of moving into new office space, the agency recently conducted an extensive online contest "Do Something Great" that invited nominations of charitable organizations to receive a contribution from causemedia.

Since its inception, causemedia has experienced a dramatic vertical launch that Gittens credits to a burgeoning corporate social awareness and commitment to community. "More and more executives are coming to understand that there's real dollar value in social advertising. causemedia is showing them how."

chapter 4 planning a giving program

Part II: Corporate Citizenship & Volunteerism

“*The fact that small businesses have a heightened requirement for good, multi-skilled employees, strong personal relationships and successful local engagement means small firms can be a good environment for corporate social responsibility to flourish.*”

— Stephanie Draper, The Industrial Society

Promoting volunteerism is a great way to augment your company's business giving program. According to a 1999 survey of 2,772 U.S. companies conducted by The Points of Light Foundation and The Conference Board, responding executives agreed that company volunteer programs advance business goals:

- 74% agreed that volunteerism increases employee productivity
- 93% agreed that volunteerism builds employee teamwork skills
- 94% agreed that volunteerism improves a company's public image

company volunteering:

- Offers personal satisfaction by connecting with people while accomplishing a visible task
- Supplements the benefits of your financial donations
- Makes financial contributions more satisfying when given to organizations one knows well through volunteering
- Helps direct the outcome of a project or program and makes it more effective
- Takes into account that people have different interests, skills and time availability. Regardless of an individual's capacity, there will always be a volunteer opportunity for that person. A local volunteer center can help you find just the right volunteer activity.

chapter 4 planning a giving program

Part II: Corporate Citizenship & Volunteerism

Here are some ways that individuals and businesses can offer volunteer support to community organizations:

Lend your technical expertise to the organization.

Legal, management, bookkeeping and technological support are always needed. Many small nonprofit organizations are long on goals and short on sophisticated administrative skills. Consider "loaning" employees with particular abilities to an organization in need.

Encourage employees to serve on nonprofit boards.

Nonprofit organizations benefit from the leadership skills and strategic expertise of community business leaders.

Consider "release time" as a way to encourage employees to do volunteer work by offering paid time off for a volunteer project.

Balancing work, family and community commitments is a challenge for many employees. Even a small amount of release time from work to volunteer can make a big difference to employees and to the community.

Place a higher priority on contributing financially to organizations with which your employees volunteer.

Company volunteers often know the inside scoop about a nonprofit organization. The fact that someone is willing to contribute his or her valuable time may help you feel confident that this is a worthy organization to support.

Support a team effort.

Supply the pizza after a day spent picking up litter along the highway. Or pay for the tools when your employees spend their Saturday helping to weatherize the homes of local senior citizens.

As a business, identify a cause in the community and do something about it.

Organize a cleanup party in the community park. Adopt a homeless shelter and commit to preparing and serving meals there once a week. Start a mentoring program for high school students who may be interested in a career in your type of business.

Set up incentive or acknowledgment programs to encourage volunteerism.

Mention volunteer activities in company newsletters and post photos and names of volunteers in a prominent place. Host a "thank you" luncheon for volunteers.

case study: HARPOON BREWERY**APPROACHING CUSTOMER RELATIONS AND PHILANTHROPY BY IMPROVING THE QUALITY OF LIFE OF NEW ENGLANDERS**

For HARPOON BREWERY, New England is far more than just their region of product distribution. It is their community. Since opening their brewery operation in 1986, Harpoon has created a sizable base of customers loyal to their locally brewed products.

In getting to know their customers, Harpoon discovered that many have a strong desire to be involved in local charitable organizations. As a result, they created a program to help people in need throughout New England. Called "Harpoon Helps," the program is made up of Harpoon Brewery staff and customers, referred to as "Friends of Harpoon."

Says Jeff LaFleur, co-director of Harpoon Helps, "We started Harpoon Helps because we believe in being a good neighbor. But we quickly noticed that there was a real desire among many young professionals to be involved with local charitable organizations. The Harpoon Helps program taps into that market and gives our core customers a chance to become more involved within their communities." Since the program's inception, Harpoon has donated thousands of dollars and many barrels of beer to New England charities every year. But with the growth of their Friends of Harpoon base, Harpoon realized it was time become proactive and do something good for communities as a group.

Now every couple of months, Harpoon invites Friends of Harpoon and Harpoon staff members on a Harpoon Helps mission. Past missions have included sorting food at the Greater Boston Food Bank, donating blood at an American Red Cross blood drive, and volunteering at a Harpoon road race to raise money for ALS research. As fellow co-director, Liz Melby remarks, "We knew that we were on to something special when, at our very first Harpoon Helps Mission, we had over 100 'Harpoon Helpers' join us to sort food at the Greater Boston Food Bank. Since then, the number of people participating in the Harpoon Helps missions has steadily grown."

"Since we started the Friends of Harpoon Program about five years ago," say both LaFleur and Melby, "we have learned that Friends of Harpoon are true representatives of our motto, 'Love Beer. Love Life.'"

chapter 4 planning a giving program

Part II: Corporate Citizenship & Volunteerism

case study: THE MATHWORKS

COMMUNITY RESPONSIBILITY RESTS WITH MATHWORKS' EMPLOYEES

Liz Callanan leads The MathWorks corporate giving program, which involves more than 1,000 staff members. She well remembers the time when the social mission was in its infancy. It was in 1991 and there were 50 MathWorks employees. At the time, Callanan wanted to work for a company that valued social responsibility and believed the business's social mission should include everyone. Her beliefs echoed those of others at The MathWorks and, as a result, each member of the staff played a role in defining the social mission. The pledge they adopted, "We will be active members of our communities, promote social responsibility, and encourage environmental awareness," remains intact today and is carried out through a varied and consistent approach to employee involvement.

The company's social mission is explained to new hires at monthly orientation sessions and everyone is encouraged to get involved and take an active role in corporate giving. One MathWorks business goal is to promote math and science education, and the majority of the company's corporate donations go to support local educational organizations. However, just how this is implemented is up to the staff. Each year, employees nominate and vote for organizations they believe should receive financial gifts and the money is divided accordingly.

True to The MathWorks mission, a number of employee-focused volunteer efforts are geared to bring math into the community, including:

- Providing training sessions for math teachers and students on "real world" applications of mathematics
- Sponsoring educational fund-raising events at The MathWorks headquarters in Natick
- Sponsoring a scholarship auction

The MathWorks also widely promotes year-round activities designed to encourage staff to get involved in their communities. These outreach activities reach a broader spectrum of needs and have included:

- Serving dinners at the Pine Street Inn
- Participating in City Year and Corporate Volunteer Day
- Cleaning up the Natick Woods
- Maintaining nature trails at local Audubon sanctuaries and Trustees of Reservations
- Sponsoring recreation trips with local student groups

With the company's growth over the years, Callanan is faced with a new challenge: introducing the philosophy of employee involvement to the European operations. Her goal is to keep them in sync with their American peers, while being respectful of a social structure that differs from that of the United States.

chapter 5 planning and managing a giving program

budget

There is no standard answer to the question, "How much should our company give?" It is a very subjective issue and depends greatly on your business, your personal goals and comfort level.

Individuals in this country contribute an average of 2.5 percent of their personal income to charitable causes. Some businesses with giving programs set aside up to 5 percent of their pre-tax income for contributions.

most companies use one of two approaches to determine their giving level:

Percentage of pre-tax net income

The giving budget is based on a pre-established formula calculated as a percentage of pre-tax net profits. In small companies, the average is around 1 percent; however, this sometimes ranges as high as 10 percent or more.

Past experience adjusted for profitability

The corporate financial plan includes an annual giving budget. In formulating the budget each year, companies take into account issues such as:

- Current revenue and profit projections
- Availability of other resources
- Internal competition for resources
- Spending patterns of other companies in the area

planning and managing a giving program

Each company must decide how much to contribute and create budget. Establishing a budget:

- Gives you a framework in which to make decisions
- Helps you say "no" to new requests if you have spent all that you budgeted
- Allows you to consider new requests if you have not yet reached your budget as the end of the year approaches
- Provides an easy way to keep track of your contributions throughout the year
- Helps you evaluate how to spend charitable dollars
- Provides a record to track how well you stayed within budget

Here are some questions to consider when establishing a budget:

- How much of your contributions are tax deductible?
- How much money did your company contribute last year and in previous years?
- Can you afford to give more?
- Would you like to give more?
- What is your target charitable budget?
- How much of your total giving budget do you want to give directly vs. sponsorships?
- Will the entire budget be centralized or will there be any funds managed within other departments or business lines?

setting up a system

Many businesses find it helpful to establish a system for considering charitable contributions. An effective giving program has specific written internal guidelines for documentation, decision making and response. This reduces time, effort and costs. It also eliminates confusion, both inside and outside the company.

The kind of system you set up depends in part on the size of the company and the anticipated giving budget. Some companies create an advisory committee that makes funding recommendations. The participation of other colleagues spreads the ownership of the giving program among staff and encourages internal communication and commitment.

planning and managing a giving program

setting up your giving program worksheet

1. Do you want to:

- Identify certain organizations that will receive annual contributions?
- Respond to requests from the community?
- Make _____% of overall contributions to an annual contributions list and make _____% of the contributions in response to community requests?

2. Who will make decisions about contributions?

- The owner(s)
- The manager(s)
- A committee that includes:
(Check all that apply)
 - Owner(s)
 - One or more managers
 - One or more employees
 - Someone responsible for marketing, advertising or public relations
- Anyone can agree to a individual contribution of less than \$_____

3. How often will you make decisions about contributions?

- Once a year
- Twice a year
- Quarterly
- As needed, depending on frequency and number of requests

Answer the following questions if you will be considering requests from the community:

4. From whom will you accept requests?

- Employees
- Customers
- Vendors
- Anyone in the community

5. Who will be responsible for collecting requests and ushering them through the consideration process? (It is important to have one person who is assigned to "manage" this process!)

- All requests should be directed to the owner
- All requests should be directed to a specific manager
- All requests should be directed to the chair of the contributions committee

6. Will you produce written criteria describing the kind of projects and programs your company supports?

- Yes
- No

7. How will you accept requests?

- In writing
- By email
- In person
- Over the phone
- All of the above

8. Are there any types of requests you would not consider?

Use the answers to these questions to create a guidelines document that sets the parameters for your giving program.

chapter 5 planning and managing a giving program

taxes

For most businesses, the question of what is tax deductible and the limits on deductions are fairly straightforward. However, it is always a good idea to check with a tax specialist if you have any questions about your contributions.

This chapter is a simplified summary of tax information. It is intended to provide an overview and does not cover all types of charitable giving. The Association of Grant Makers (www.agmconnect.org) can provide more information about the tax benefits of setting up a business or family foundation and other aspects and choices for charitable giving.

Make sure that any organization to which you contribute has been approved as a tax-exempt organization by the IRS. In most cases, this will be a 501(c)(3) organization or a government entity (e.g., public school). If the organization doesn't have an appropriate IRS designation, you will not be able to deduct your contribution.

deduction limits for businesses

Before you establish a charitable giving budget, you will want to know how much of the value of your contributions you can deduct for tax purposes. The following guidelines illustrate the tax benefits you can receive from your charitable giving program.

If a business other than a C Corporation has more than one owner, the business's deductions are distributed among the owners.

Business structure C Corporation

Who receives deduction Corporation

Allowable deduction Up to 10% of business's taxable income in the year of the donations. Contributions over 10% can be carried over for five years.

Business structure S Corporation

Who receives deduction Individual owner(s)

Allowable deduction Up to 50% of individual's adjusted gross income in the year of the donation(s).^{*} There is generally a five-year carryover.

Business structure Partnership

Who receives deduction Individual owners

Allowable deduction Up to 50% of individual's adjusted income in the year of the donations.^{*} There is generally a five-year carryover.

Business structure Sole proprietorship

Who receives deduction Individual owner

Allowable deduction Up to 50% of individual's adjusted income in the year of the donations.^{*} There is generally a five-year carryover.

^{*}This information is based on cash contributions to 501(c)(3) corporations. Contributions of other types of property or to foundations and some organizations with different IRS tax designations offer different tax benefits.

chapter 5 planning and managing a giving program

eligible deductions

Not all contributions are equal in the eyes of the Internal Revenue Service. It is helpful to know what contributions are eligible for full or partial tax deduction. The IRS treats business expenses differently from charitable contributions, so it's important to be precise about claiming deductions. The following summarizes IRS regulations. If you have any questions, be sure to consult a professional tax advisor.

Type of contribution direct cash donation to charity

Charitable Deductions Yes. However, if you receive any benefit in return (such as a meal at a fundraising event), you must subtract the value of that benefit from the amount of your deduction.

Business Expenses No.

Type of contribution cash given to charities designated by employees (such as matching gifts)

Charitable Deductions Yes.

Business Expenses No.

Type of contribution sponsorship

Charitable Deductions Yes, if not directly related to business. Indirect benefit may be permissible.

Business Expenses Yes, if directly related to business.

Type of contribution purchase of ad in nonprofit publication

Charitable Deductions Yes, if ad is acknowledgment of sponsorship rather than commercial.

Business Expenses Yes, if you expect to earn at least the cost of the ad as a result of the publication.

Type of contribution gifts of products

Charitable Deductions Yes, but only for the value of your costs — not market value.*

Business Expenses No. You cannot deduct your costs as both a business expense and a charitable contribution.

Type of contribution depreciable property

Charitable Deductions Yes. Generally fair market value less prior depreciation.

Business Expenses No.

Type of contribution stocks

Charitable Deductions Yes, of both C and S corporations. Deductions generally can be made for fair market value if held by the donor for more than one year.

Business Expenses No.

*However, inventory donations by C corporations (to benefit the ill, the needy or infants) and gifts of scientific equipment used for research may be eligible for higher value deductions.

chapter 6 evaluating nonprofit partners

Your company's resources

are being distributed and you want to be sure they will be used wisely. Use your application process to help determine both a candidate's organizational soundness and fiscal responsibility, as well as to identify recipients that help you meet your objectives. As with your guidelines, keep the procedures specific, brief and simple.

You can develop a simple questionnaire, provide an application form or ask for a brief (two-page) proposal or letter to get basic information about the applicant. Additional information — such as financial statements, a list of board members, annual report and proof of tax exempt status — can be submitted as supporting documentation.

Evaluating requests for support is similar to evaluating other business opportunities. The process requires common sense and answers to basic organizational questions.

The following worksheet provides a checklist of questions and issues to consider when evaluating a nonprofit partner.

chapter 6 evaluating nonprofit partners

checklist for evaluating a partnership

- Make sure the organization is eligible for the purposes of tax deductions.**

If you plan to claim a deduction for your charitable contribution, the receiving organization must be tax exempt according to the Internal Revenue Service. Ask for a copy of a letter of determination from the IRS certifying that the organization as a 501(c)(3) tax-exempt organization or government entity (e.g., public school).

- Determine whether the organization can effectively accomplish its goals.**

Look for:

- An active board of directors with a variety of skills
- Broad community support in the form of volunteers and contributors
- An easy-to-understand annual budget and financial statements that show a realistic and reasonable projection of revenue and expenses
- Reasonable administrative and fundraising costs — generally less than 30% of the total budget
- A track record of past success and a good reputation

- Find out how the organization knows that its work is important or needed.**

For example, ask about the number of people in the community who

benefit from the services the organization provides and how many people will benefit from a \$500 contribution.

- Ask the question, “How will you know if you are successful?”**

Ideally, board and staff will measure success to show positive changes in the community. Ask what tools they use to measure impact.

- How does this organization fit within your other goals?**

Is an employee or a customer a supporter or beneficiary of this agency? How does it acknowledge its donors? How visible is it in the community?

- Some ways to learn more about organizations include:**

- Prepare a simple questionnaire** for applicants.
- Keep a clipping file** of newspaper articles about organizations that work in your areas of interest.
- Ask questions** of the executive director or board members.
- Ask people who know.** (See pp. 30–31 for suggestions.)
- Make sure you are on the mailing list** of any organization to which you contribute. Keep its newsletters and other mailings so you can refer to them when it's time to contribute again.

chapter 6 evaluating nonprofit partners

case study: JORDAN'S FURNITURE

FOCUS, START SMALL, SEE RESULTS: THE PHILANTHROPIC STRATEGY OF JORDAN'S FURNITURE.

It begins with the philosophy that companies partnering with nonprofits should always start with baby steps. First create a partnership with a charity that coincides with your interests and then get to know each other. For Jordan's Furniture, one such beginning was their support of the Massachusetts Adoption Resource Exchange. This six-year relationship began with a small financial donation. Today, Jordan's hosts events and campaigns for much larger gifts.

According to Heather Copelas, director of public relations for Jordan's Furniture who works closely with Barry and Eliot Tatelman to oversee corporate giving for the organization, "The program evolved as we began to see success stories related to our giving. We gravitate to those programs where we can see results, specifically results with children in need. There is a natural progression and, as you start to see more and more need, you start to get more and more involved." And, for Jordan's, it is also important to track outcomes. "I need to know how every dollar is spent and how a charity works," says Copelas. "Our work with the Massachusetts Adoption Resource Exchange is a rewarding investment for Jordan's because we know that we are responsible for helping more than 110 kids move from foster care to adoptive homes."

Jordan's Furniture believes that it is important to be focused, because spreading yourself too thin is "just not as impactful." Jordan's decided to focus specifically on children because, as Copelas says, "there are countless charities, but the ones that tug at your heart are the ones that involve victims of circumstance, and human nature dictates that we help those who can't help themselves. At Jordan's we have to make the tough decision to say 'no' to charity requests, sometimes 10 times a day. The requests come from worthy organizations. However, we cannot help everyone. About 99% of our philanthropy involves children in need, especially those in foster care and hoping for adoption."

For Jordan's, their business success has instilled a sense of responsibility to others. "Giving back is one of our roles in the community and we can have the greatest impact in the most meaningful way by focusing our efforts," said Copelas. "It is just what we do."

chapter 7 evaluating & communicating program success

monitoring and tracking your outreach

Set up a system of monitoring your outreach that makes sense for your company and your program. While keeping this as simple as possible — both for you and the nonprofits you support — you want to be sure your system makes clear the impact of your support on those receiving your resources. Select semi-annual meeting dates to review your progress with your partners and your internal committees.

Evaluation tools include:

- Site visits by members of the giving committee
- Reporting forms from the organizations you support
- Measuring outcomes with metrics that demonstrate impact
- Third-party evaluators

keep records of your giving

Federal rules do not mandate any specific documentation for corporate giving. Generally, the records you need to keep are those that support the information included on the company's tax return.

With respect to grants, you need to be able to show that the funds were used for a charitable purpose to claim a deduction. Normally, this means keeping on file a grant folder that includes the application, the grantee's IRS tax determination letter, correspondence, a grant agreement letter (if you used one) and any reports you required of the grantee. Keep grant files for approximately six years. Off-the-shelf software exists to help companies monitor grants.

evaluating & communicating program success

what about recognition for charitable contributions?

The extent of recognition you look for depends on your goals for contributing. If, in addition to serving your community, you want to use your contributions as a way to build the company's image, you will want to think about the ways you would like to be acknowledged.

Some businesses prefer to contribute anonymously. They believe their gifts are most effective that way and they believe that the lack of publicity limits the number of requests for funds. However, most people and businesses are happy to be publicly acknowledged for their contributions.

A business can let the community know of its commitment to local organizations in various ways:

- Announce your contributions in publications distributed to employees and customers.
- Distribute press releases, particularly if your business provides a major grant or if you are announcing a number of grants at the same time.
- Create a joint press release with the organization receiving the grant.
- Take an active role in an organization to which you contribute. The owner or manager may want to assume a place on the board of directors.
- Encourage employees to volunteer.

Well-run organizations acknowledge their contributors by publishing their names in newsletters or in press releases. One of your evaluation criteria may be how promptly the organization thanks you and what steps it takes to acknowledge all contributions.

evaluating & communicating program success

case study: GRAND CIRCLE TRAVEL

GRAND CIRCLE TRAVEL: THEIR PASSION FOR COMMUNITY CIRCLES THE GLOBE

When Alan and Harriet Lewis bought Grand Circle Travel in 1985, their mission was to “help change the lives” of their travelers, associates (employees) and the communities where Grand Circle lives and works — in Boston and in more than 40 countries around the world.

Unlike many other companies, Boston-based Grand Circle took a worldwide approach to their philanthropy right from the start. With a belief that their success should be shared, the Lewises committed to giving back through volunteerism and funding educational, cultural and humanitarian organizations in Boston and in countries where Grand Circle operates trips. To back their belief, the Lewises established the Grand Circle Foundation in 1992, funded through company profits. Today it supports more than 35 projects around the world. The Foundation is guided by an honorary board of directors that includes international explorer Sir Edmund Hillary; renowned photographer and Boston’s Museum of Science founder, Brad Washburn; and his wife, Barbara, the first woman to summit Alaska’s Mt. McKinley.

Having established the Grand Circle Foundation to formalize their giving, the Lewises encouraged and provided funding for their associates to launch the Community Services Program in 1994. The program allows associates to organize, on company time, and drive more than a dozen community service events each year. Annual events include a Boston Harbor fundraising swim; the AIDS Walk; and an all-day home-repair project called Rebuilding Together Boston. The team also receives funding from company profits through which they can encourage, evaluate and fund local grant proposals.

Grand Circle’s model of giving back has evolved significantly throughout the years. Unlike its earlier years, the Foundation now offers its travelers exclusive visits to schools, orphanages, historical sites and cultural institutions that it supports worldwide. To ensure a memorable, high-impact experience, every traveler is now asked to evaluate the site visit and recommend improvements. Grand Circle evaluates its overseas offices based on how much a site visit “helps change the lives” of Grand Circle travelers.

The Community Service Program has also evolved significantly. Today, more than 80% of the company’s Boston associates volunteer at one or more events each year. The program has created a Community Advisory Group of 17 nonprofit partners, which is designed to maximize Grand Circle’s resources for the group and share resources and best practices among the myriad group members. Additionally, Grand Circle’s model of volunteer service has been expanded worldwide with Grand Circle encouraging and funding projects among interested regional offices. To date, Grand Circle associates in Thailand, Hong Kong, China, Mexico, Germany, and the United Kingdom have organized their own local service events.

appendix

philanthropy tool kit partnership

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AGM is a community of foundation staff and trustees, corporate grant makers, donors and philanthropic advisory services that work together to increase their individual and collective impact and effectiveness. We foster a neutral environment for interaction and collaboration toward the exchange of knowledge and information, educational and professional development to advance and increase awareness of the field of philanthropy in Massachusetts and the region.

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The Boston Business Journal is the region's leading source of business-to-business news, from broad industry trends to its top-25 lists. The BBJ specializes in reporting on the area's next generation of growth companies and the people who are leading them, and pays close attention to the intersection of business and civic life and the philanthropic activities of the business community. The Boston Business Journal actively supports numerous local charities believing that a healthy community is an important ingredient for a strong business climate.

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The Boston Foundation, one of the oldest and largest community foundations in the country, has an endowment of about \$650 million and awards some \$50 million in grants every year. Made up of hundreds of separate funds — established for special purposes or the general benefit of the community — it also serves as a civic leader, convener and provider of information. As a central part of its work, the Foundation shares its grantmaking expertise with its donors and assists them in focusing and maximizing their giving.

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TPI is a nonprofit consulting firm that provides philanthropic planning, social issues research, program design and management services to individual donors, families, companies and foundations. Founded in 1989, TPI works exclusively for donors and philanthropic institutions to support them in achieving high-impact philanthropy. As a complement to its extensive hands-on consulting practice, TPI also seeks to encourage more effective giving through donor education, research and writing.

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UWMB partners across the community to develop and execute prevention-based programs within four impact areas: Child Development, Youth Opportunities, Affordable Housing and Sustainable Employment. To learn how your company can partner with UWMB, visit our website at www.uwmb.org. To utilize our complimentary online tool kit for corporate volunteer programs, visit www.uwmb.org/howtohelp/corporation.htm.

appendix

additional resources

The Better Business Bureau Wise Giving Alliance collects and distributes information on hundreds of nonprofit organizations and their programs, governance, fund raising practices and finances. They also publish the quarterly **Wise Giving Guide** designed to help donors make informed giving decisions. The Guide currently includes a compilation of latest evaluation conclusions completed by the former National Charities Information Bureau and the former Philanthropic Advisory Service (www.give.org).

Boston Cares is a nonprofit organization that works with companies to create volunteer community service projects or augment existing community outreach programs (www.bostoncares.org).

Business for Social Responsibility is a membership organization for companies seeking to sustain their commercial success in ways that demonstrate respect for ethical values, people, communities and the environment (www.bsr.org).

The Catalogue for Philanthropy is a resource for donors that provides a listing of charitable giving opportunities in Massachusetts organized by philanthropic field (www.catalogueforphilanthropy.org).

The Center for Corporate Citizenship is a membership-based research organization. It works with global corporations to help them define, plan and operationalize their corporate citizenship. Their goal is to help business leverage its social, economic and human assets to ensure both its success and a more just world (www.bc.edu/centers/cc/).

Charity Navigator is an independent charity evaluator that works to advance a more efficient and responsive philanthropic marketplace by evaluating the financial health of America's largest charities (<http://www.charitynavigator.org/>).

Chronicle of Philanthropy is a bi-weekly national trade publication for charity leaders, fund raisers, grant makers and other people involved in the philanthropic enterprise (www.philanthropy.com).

The Conference Board creates and disseminates knowledge about management and the marketplace to help businesses strengthen their performance and better serve society (www.conference-board.org).

Corporate Volunteer Council of Greater Boston strengthens, facilitates and promotes volunteerism within its membership and surrounding communities. The CVC also encourages cooperation and participation in public-private volunteer partnerships (www.cvcboston.org).

The Council on Foundations is a membership organization of more than 2,000 grantmaking foundations and giving programs worldwide. They provide leadership expertise, legal services and networking opportunities to their members and to the general public (www.cof.org).

Independent Sector is a coalition of leading non-profits, foundations and corporations strengthening not-for-profit initiative, philanthropy and citizen action (www.independentsector.org).

The National Center for Black Philanthropy, Inc. (NCBP) promotes increased giving and volunteerism among African Americans and educates the public about the importance of African American philanthropy (www.ncfbp.net).

Responsible World is a community relations service firm that designs, manages and supports high-impact, cost-effective programs for businesses and community organizations (www.responsibleworld.com).

“*A new breed of givers, both individual and institutional... view themselves as ‘investors’ rather than simply donors... [They] seek information about the nonprofits they fund, and expect measurable social returns on their investment. It is with these investors that the future of the social sector lies.*”

— William F. Meehan III, McKinsey & Company, Inc., Derek Kilmer, Tacoma-Pierce County Economic Development Board, and Maisie O’Flanagan, McKinsey & Company, Inc.

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