A Playbook for Effective Corporate Giving

For small and medium-sized businesses

Rodman & Associates

Professional Philanthropic Advisors

How will this playbook help my business?

Successful company leaders understand that philanthropy is a critical aspect of business today. Communities and individuals depend on corporate giving, which supports various causes including education, affordable housing, and the arts - just to name a few.

Does your company have a formal giving strategy? Do you have a plan for business giving that fits your company's mission, maximizes the impact on nonprofits and helps boost employee morale? If not, don't be discouraged - most small and medium-sized businesses don't yet have a formal business giving plan.

That's where this playbook comes in. By applying best practices used by larger corporations and other established business philanthropists, your company can put an effective plan in place right away. The best part is: when you put your heart and passion into the process, everybody wins.

Benefits of corporate giving

There are several reasons your company should strive to be a leader in giving to nonprofit organizations and causes. These include:

- Philanthropy demonstrates your company's commitment to being a socially responsible entity and good community neighbor.
- Positive image and reputation are crucial to building brand loyalty and gaining new customers. Customers that have a strong positive association with a business become ambassadors for your product, and a good reputation also helps you attract future employees.
- Employee morale and company pride are enhanced by corporate giving. A strategic approach to giving provides volunteer opportunities and other fun, creative ways to engage a cause beyond just writing a check.

This playbook includes several helpful sample planning documents and worksheets to help you along the way. Now let's get started building your corporate giving strategy!

STEP 1:

Assess your company's current philanthropic efforts

The best way to get started is to assess your current giving, whether it be through financial donations, in-kind donations of goods and/or services, employee volunteering, or a combination of these methods. There are several questions to answer:

1. What are your employees' and customers' passions and priorities, and what elements of your philanthropic strategy are matched to them? Which priorities are not well served?
2. How does your strategy compare to your competitors? What differentiates it? (To assist with this, Rodman & Associates can research comparables by industry, percent of revenue, and number of employees).
3. What are your company's goals for corporate giving, and how would you prioritize them? (See Goals for Corporate Giving Worksheet on the following page).
4. How can you leverage your company's core strengths, values and business model in your giving strategy?

Example 1: A manufacturer with strong assembly line systems volunteered its employees' expertise to benefit a local food bank. Workflow efficiencies were identified to maximize the flow of donated items to the floor, streamlining the process by which patrons are able to get their food. The company was also able to help the food bank to adopt new training techniques, enabling new volunteers to join the process at a much faster rate. The partnership is a win-win: helping the food bank better fulfill its mission, encouraging cross-departmental team building within the company, and providing really positive media exposure for both organizations.

WORKSHEET 1:

Goals for Corporate Giving

Please rank the importance of your key goals and motivations for giving (please assign the following a value of 1-7, with 1 being the highest importance and 7 being the lowest):

______Build brand and corporate image
______Employee attraction and retention
______Enhance employee skills
______Increase revenue and market share
______Drive traffic to store or website
______Deepen relationship with clients and customers
______Ability to co-brand the campaign with the nonprofit or other business(es)

Briefly answer the following:

1) Do you believe that your company's philanthropic goals, and the way you prioritize them, match your employees' and customers' philanthropic priorities? If not, how do they differ?

2) How far do you feel that your company's current philanthropic efforts go toward meeting its goals? In what areas would you like to see improvement?

3) Which of the above goals do you feel would be the easiest to achieve through a partnership with a nonprofit; and which would be the most difficult? Why?

STEP 2:

Identify and address key challenges

As with any business endeavor worth doing, there can be challenges in creating, implementing and managing a corporate giving program. Identifying and addressing these challenges from the outset can help you overcome them. Consider some of the common challenges facing small- and mid-size companies:

1. Gaining senior management's support.
2. Having sufficient staff to manage the program.
3. Finding appropriate nonprofit partners.
4. Identifying appropriate models or projects (this can involve funding, volunteering or other support).

Are there other challenges specific to your company, industry and/or business model? Make a "T-chart" to help with brainstorming both challenges and solutions (see Sample "T-Chart" on the following page).

Example 2: Employees of a law firm actively partnered with a nonprofit that provides support services to a large immigrant population. Attorneys provide pro-bono legal services at immigration proceedings, while their administrative staff is teaching English-as-a-second-language classes. Also, the firm donates all of its gently used computer equipment to the nonprofit, while everyone is encouraged to take advantage of the office "dress casual" option by donating $10 for the privilege to wear jeans on Friday. Next year the firm intends to get its clients involved!

Corporate Giving Challenges and Solutions Sample T-Chart

Example Using Small Social Marketing Agency

Challenges to Our Corporate Giving	Solutions
• Gaining senior management's support	• Schedule one-on-one meetings with management to solicit feedback; create an executive summary to share how the team agrees and where they don't. Consider bringing in an outside consultant to define a strategy and to prepare a roadmap
• Having sufficient staff to manage the program	• Seek easy to implement, low-manpower options
• Finding appropriate nonprofit partners	• Conduct a nonprofit evaluation process
• Identifying appropriate models or projects	• Evaluate partner opportunities based on our prioritized list of goals for corporate giving

General Challenges to Our Business	Solutions
• Visibility in the community	• Participate in high-visibility charity events
• Employee retention	• Build employee morale; provide volunteer opportunities to develop skills
• Reach more customers	• Pursue a partnership with a nonprofit that provides access to their audience
• Enhance reputation for expertise/cutting edge design work	• Provide in-kind creative services as part of partnership
• Customer retention	• Engage customers in the company's charity efforts to build team atmosphere and loyalty

STEP 3:

Determine your criteria for choosing a charity (or charities) to support

Deciding which nonprofit(s) your company will support is made easier when you have a predetermined set of criteria to help you choose. For starters, you should:

1. Eliminate programs not in alignment with your company's mission, identity, values or purpose.

2. Consider your company's core strength, values and business model to help find the proper fit for a nonprofit partner to support (use the Nonprofit Evaluation Worksheet as a guide).

3. Encourage participation and buy-in among your employees in the selection process. Consider a company-wide survey to examine employee perspectives and gain feedback (see Sample Employee Survey Questions).

4. Once you define the criteria (for example, local organizations that focus on social issues), it is easier to decline requests from nonprofits outside of those categories. You may even prepare a response for such solicitations. There are countless areas of need, but to try to support them all just dilutes your impact.

"When identifying philanthropic partners that will ultimately inspire a team to rally around a cause, it doesn't take long to realize that people matter as much as the cause and the mission. While associating with non-profit partners that will align with your corporate strategy is the minimum goal, discovering partners that will bring your employees' hearts into the fold is simply priceless. One must never underestimate the power of true inspiration." – Bill Duffy, Vice President of U.S. Operations, Sky Zone Franchise Group

WORKSHEET 2:

Nonprofit Partnership Evaluation

Does the proposed partnership fulfill the following requirements? Check all that apply (and "X" those that don't):

______Ability to elevate our company's brand and profile
______Clear marketing tie-in for our business/service
______Mission relevance to our customers and employees
______Options to engage in the community/communities we serve
______Ability to increase traffic at our stores, online or in other ways
______Easy to implement
______Options for fun: when people enjoy what they do, they do it better

Briefly describe the following:

1) What is the nonprofit organization's mission/primary purpose?

2) Who does the nonprofit serve?

3) How long has the nonprofit been in operation, and what is its reputation and reach?

4) In what ways do our company and the nonprofit have a potential fit?

5) What opportunities for employee engagement could a partnership provide?

WORKSHEET 3:

Employee Survey on Corporate Giving: Sample Questions

1. When it comes to philanthropy, what are the top 3 causes you care about the most?

2. How do you personally contribute to those causes?

3. When you contribute to charity, do you:

- ❏ Donate money
- ❏ Volunteer
- ❏ Both
- ❏ Other

4. Would you be willing to serve on a community engagement committee or to lead a company-wide volunteer effort?

- ❏ Yes
- ❏ No

5. How would you like to see the company support your efforts:

- ❏ Company match for your personal donation
- ❏ Time off during the work day to volunteer
- ❏ Opportunity to share your passion with coworkers (in the company newsletter, in an employee meeting or event, etc.)
- ❏ Corporate donation to match your volunteer hours, e.g. “Dollars for Doers”

STEP 4:

Implement your Corporate Giving program

After you've completed steps 1-3, it is time to formalize your giving plan. Consider the following aspects of your plan and put it in writing to help guide the process:

1. Which nonprofit or nonprofits have you chosen to support?

2. In what ways will your company provide support (corporate donations, employee giving program, in-kind donations, employee volunteering, a cause-marketing partnership, or a combination of these methods)?

3. What is the timeline for the partnership? A partnership could be for 3 months, 1 year, or 3-5 years, for example. Many companies find value in longer-term partnerships. As the partnership matures and deepens, the company becomes aligned with the nonprofit cause in the public's mind - and benefits from a halo effect.

4. Execute a letter of agreement with the nonprofit that creates clear and measurable benchmarks to ensure your giving program proceeds throughout the year as planned. This will be important later when tracking and measuring success (see the Creating a Letter of Agreement Worksheet on the following page).

5. Clearly designate roles/duties for managing the program: Who is in charge of or manages the program? Is it a team effort, and if so, who is the team and what are their roles? Is third-party expertise or consultation needed? There are several options for outsourcing your administrative needs.

6. Make it FUN! Remember that a key benefit of a successful giving program is the morale boost it provides for employees. Encourage creativity and brainstorming fun ways to support the program.

Example 3: A small social marketing agency adopted a local nonprofit to help them develop a social media strategy. The partnership began with an overhaul of the nonprofit's Instagram, Twitter and Facebook pages. Recognizing the nonprofit had no designated staff to handle social media moving forward, agency and nonprofit staff worked together to prepare an editorial calendar for the year and the firm committed four hours each week of its own staff time to handle the posting. This collaboration allowed both the nonprofit and the marketing agency to better tell their stories! The effects of the enhanced social media presence were documented and used by the firm to illustrate the impact of their services to potential new clients.

WORKSHEET 4:

Creating a Letter of Agreement

When you've reached an agreement to partner with a nonprofit organization, it is time to draft a letter of agreement between your company and the nonprofit, outlining the details of your partnership.

Your letter of agreement should include the following aspects:

Introduction:
This should include an overview of both organizations, including your common goals, values and shared mission.

Terms:
The following details should be included in your letter of agreement, introduced with a statement such as "In consideration of the mutual goals outlined above, the parties agree as follows:"

1. Duration of the partnership.

2. Deliverables from each side with a timeline, or triggers, for those deliverables.

3. Understanding of any shared intellectual property.

4. Payment schedule.

5. Explanation of how the charity will use the funds.

6. Shared use of trademarks and logos.

7. How the arrangement will be promoted by both organizations.

8. Understanding of how the charity will report back as to the impact of the partnership: key performance indicators, program highlights and results.

9. Indemnity clause.

STEP 5:

Measure and communicate your results

Once your plan is in place, don't just file it away for later. It should be managed and tracked to make sure your company is meeting its philanthropy goals and getting the most out of your careful planning. Here are some things to remember to do:

1. Keep careful track of donations, both financial and in-kind, and volunteer hours provided to charity. In-kind donations and volunteer hours can be quantified to an approximate dollar value.

2. Understand what your contribution has provided. Your nonprofit partners should be able to clearly identify this information (examples: A food bank was able to deliver 500 more meals; an animal charity was able to rescue 200 more pets).

3. Communicate your philanthropic impact to employees: In company meetings; through emails to employees; in employee newsletters and other outlets.

4. Communicate philanthropic efforts to customers and other stakeholders: Highlight partnerships on your company's website and social media; support philanthropic efforts with campaign outreach via email, regular mail or advertising.

5. Inform media and the public: For events, partnerships or substantial gifts, send a press release; reach out to local media on behalf of the charity or cause you are supporting.

For help measuring your results, see Sample Corporate Giving Tracking Form on the following page.

You've come this far, using this playbook as your guide. And now, you're ready to implement a strategy for business philanthropy that will provide win-win scenarios for your company, your employees and your nonprofit partners - hopefully for years to come.

Sample Corporate Giving Tracking Form

Example using law firm partnership with immigrant support services nonprofit

DATE	DETAILS	VALUE
1/12	Employee driven financial support raised through Casual Dress Fridays	Check for $5,000
3/7	Co-hosted sign-up drive for ESL classes	97 enrollees
5/29	Staff time committed to ESL course: 48 hours (4 employee volunteers @ 12 hours)	Value $2,160
7/1	Corporate pledge to double employee funds raised through Casual Dress Fridays	Check for $10,000
8/29	Donation of 10 laptops, with software, and wireless router	Value $12,000
12/30	Provided 35 hours of in-kind legal assistance	Value: $7,875
		TOTAL
	Direct financial contribution	$15,000
	Pro-bono services and staff time	$10,035
	In-kind donation value	$12,000
	Total impact for the year	$37,035

Communication to employees:

1. Discussed in firm meeting on 1/10, employees invited to participate.
2. Employee newsletter article on 1/15 outlined upcoming opportunities and invited participation.
3. All-staff email on 3/1 reminded employees of upcoming ESL classes as well as the need for in-kind legal counseling, asked for volunteers.
4. Employee newsletter on 6/15 highlighted ESL classes with photos of employee teachers.
5. Employee newsletter on 12/15 recapped the partnership and communicated results.

Communication to the public:

1. Partnership featured on company website and highlighted with various Twitter postings.
2. Photo slideshow of partnership events posted on company Facebook page.
3. News feature on Univision.
4. Presented at State Bar meeting.
5. Inclusion in Immigration Court Docket newsletter.

We're here to help!

We hope you find this playbook informative and helpful, and we would like to know the results of your planning. We would also be happy to provide more information about creating or managing a successful corporate giving program.

Please contact Rodman & Associates today:

Email: info@RodmanAssociates.com
Phone: 512-365-0360
Or visit RodmanAssociates.com

Rodman & Associates are seasoned professional philanthropic advisors dedicated to helping organizations, large and small, make their philanthropic mark. Our goal with each client is two-fold: 1) to help you clarify and formalize your objectives for giving; and 2) to use our extensive knowledge of local, national and international nonprofits to find the best philanthropic fit for your organization.

Let Rodman & Associates use our knowledge base and experience to create and implement a plan that works for you. We look forward to consulting with you on all of your philanthropic, foundation, and corporate giving needs.

About Lisa Rodman

Lisa Rodman is a 20-year veteran of the non profit arena and principal and founder of Rodman & Associates, where she advises and supports individuals, businesses, and foundations on philanthropic initiatives and partnerships. Lisa pulls from her extensive career in the charitable sector, corporate philanthropic initiatives, gift management, compliance, and years of experience assessing impact to achieve meaningful results both domestically and internationally.

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