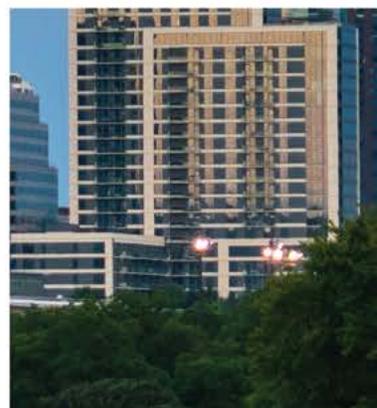
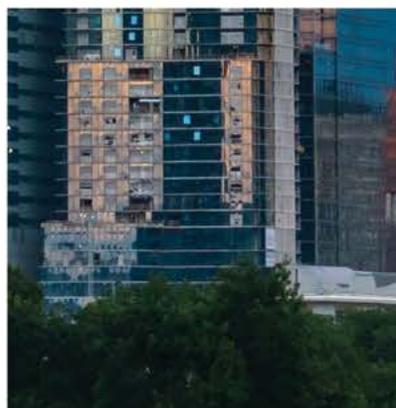
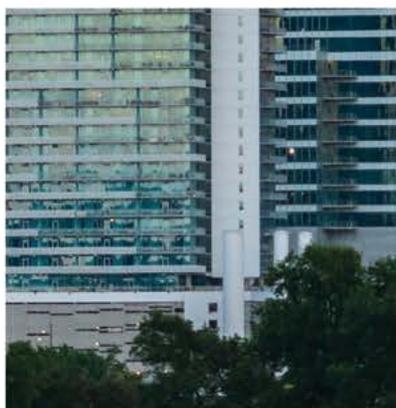
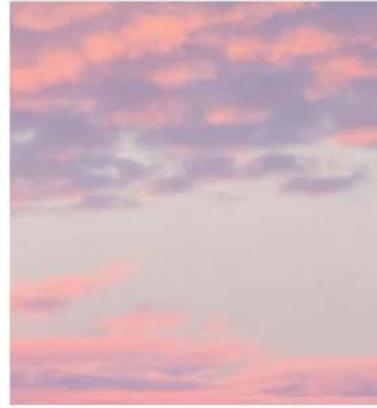
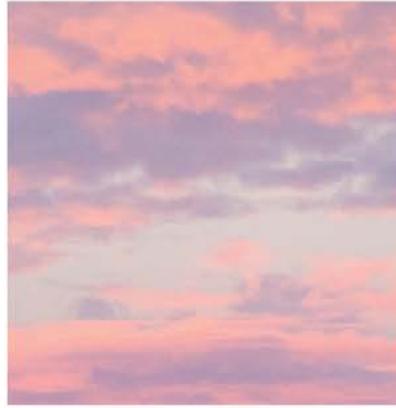


# 2019 Rodman Report

A Survey of Corporate Giving in Central Texas



Rodman  
& Associates

*Professional Philanthropic Advisors*

## Welcome to the 2019 Rodman Report

### A Survey of Corporate Giving in Central Texas

This is the fifth year that we've conducted the Survey of Corporate Giving in Central Texas, and the insights we've gained feel as timely as ever – especially knowing that every day, more businesses and their employees make Central Texas their new home.

Austin Mayor Steve Adler expressed it best in his message to survey participants: “Austin has a thriving business community. That in itself is a great thing, but it’s even better knowing that our local businesses are forces for good in our community. In addition to the services, products and employment they offer, they also provide nonprofits with donations and employee volunteer hours that help fulfill a variety of missions, from education and human services to environmental and animal welfare causes.”

This year we added several new questions to gain a deeper level of insight into how companies make their giving decisions, what factors influence their support, how they measure success, and more. The responses are extremely valuable to anyone in the business or nonprofit realm who is involved in corporate giving, and I invite you to share the Rodman Report with them. My sincere thanks to everyone who took the time to participate in the survey, sharing critical information for the benefit of us all.



**Lisa Rodman, Principal and Founder, Rodman & Associates**

Special thanks to our partners for helping to distribute the Survey of Corporate Giving:

ATX REAL ESTATE NEWS



FingerPulse Media, Inc.

GIVINGCITY AUSTIN



RecognizeGood



# Executive Summary

This year's survey of more than 150 companies broke new ground, with several added questions that we asked for the first time – addressing such issues as what drives corporate giving, how impact and ROI are measured, the criteria companies use to decide who they will support, and perceived downsides to corporate giving. We also addressed local impact, asking whether they provided charitable support to help victims of Central Texas floods in 2018.

Philanthropy can take many different forms, including monetary donations, employee volunteerism, donation of the company's products or services, and/or donation of another company's products or services. Understanding how giving decisions are made is important both for the companies that give, and the nonprofits that depend on their support.

## Giving budgets still growing

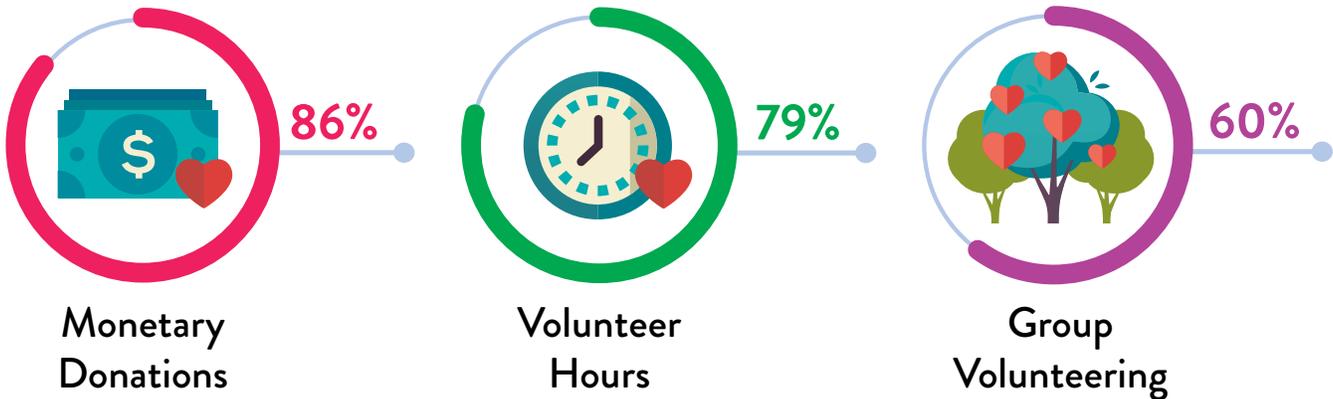
Most companies have philanthropic/giving budgets, and the majority of respondents said their budgets either increased or stayed the same (43 percent and 36.5 percent, respectively) from 2017 to 2018.

Growth of philanthropy budgets slowed somewhat – in last year's survey, giving budgets increased at 61 percent of companies. Fewer than 2 percent, however, said their budgets decreased – demonstrating that giving levels still trend higher overall.



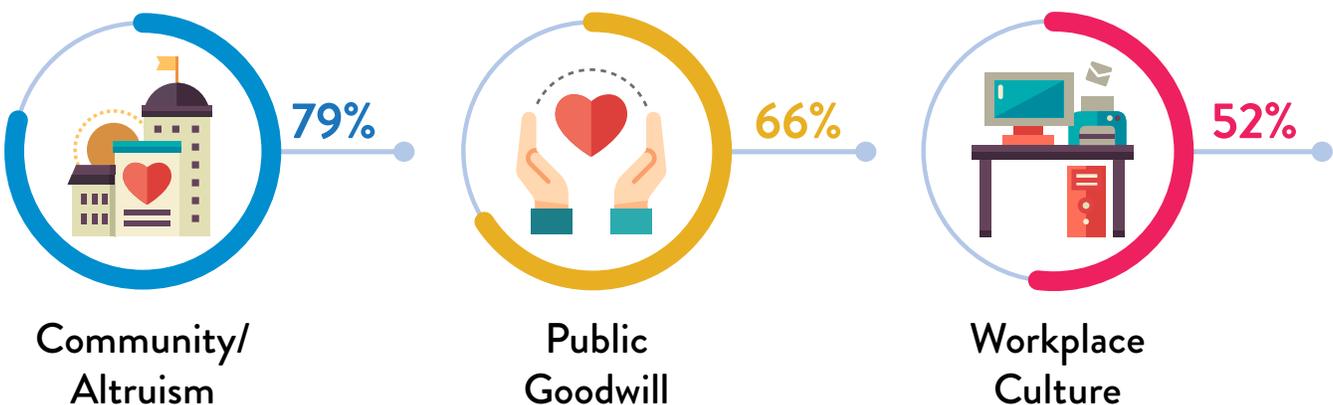
## How companies give

Most companies cited monetary donations (86 percent) and volunteer hours (79 percent) as methods of giving. Group volunteering is encouraged/organized at 60 percent of companies.

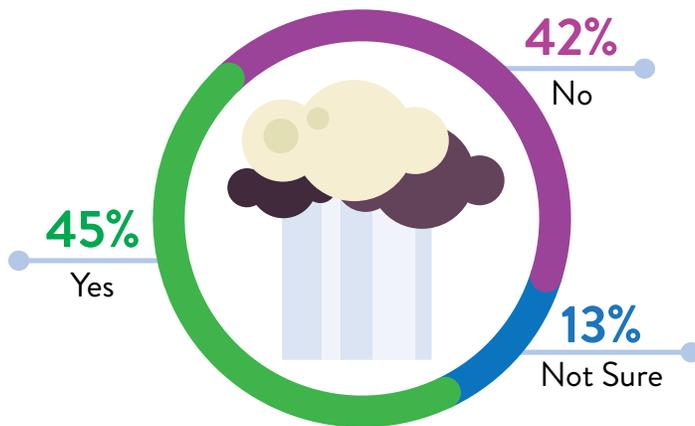


## Key drivers for corporate giving/community investment

Most companies included support for the community/altruism (79 percent), public goodwill (66 percent), and reinforcing workplace culture (52 percent) as the most important reasons for engaging in philanthropy.



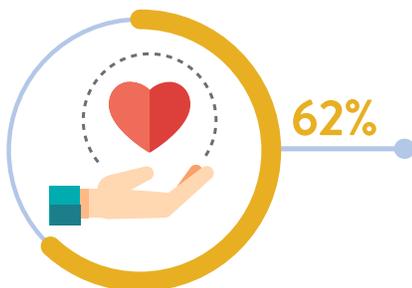
## Local impact – Central Texas flooding



Several Central Texas communities were heavily impacted by damaging floods and severe weather last year. When asked whether their company supported specific efforts to assist victims in those situations, the results were nearly split, as 45 percent of respondents said yes, 42 percent said no, and 13 percent weren't sure.

## Criteria for selecting nonprofits

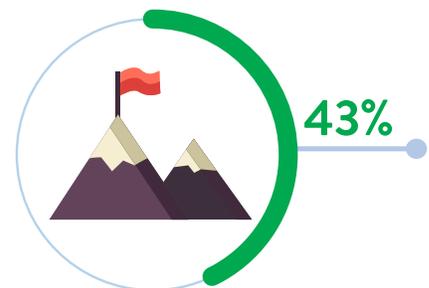
Companies said their most important criteria for giving is the population served (62 percent), followed by employee involvement (44 percent) and the relevance of the mission to customers and clients (43 percent).



Population Served

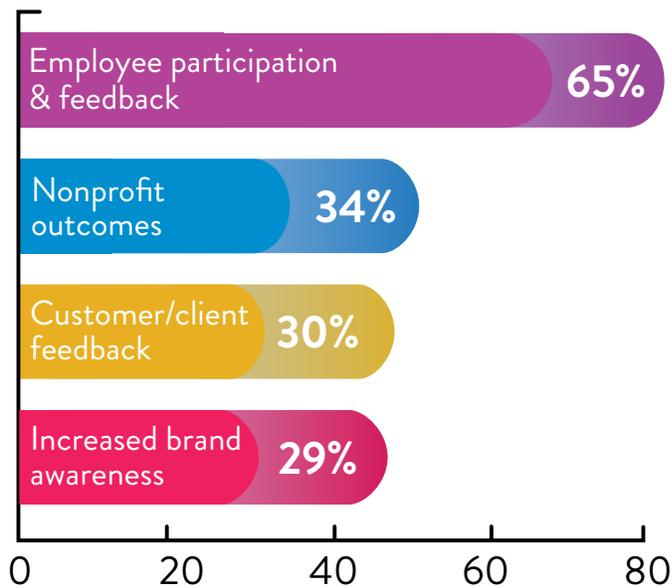


Employee Involvement



Mission to Customers & Clients

## Measuring the ROI and impact of charity



The majority of companies track employee participation and feedback (65 percent) as the primary means of measuring their charitable ROI.

This is followed by nonprofit outcomes (34 percent), customer/client feedback (30 percent) and increased brand awareness (29 percent).

## Downsides to corporate giving

Asked for honest feedback about possible negative impacts of corporate giving, more than three-fourths of respondents said **THERE ARE NO DOWNSIDES TO THEIR PHILANTHROPY.**

Nearly one-fourth said it takes either funding or human resources away from core business functions.



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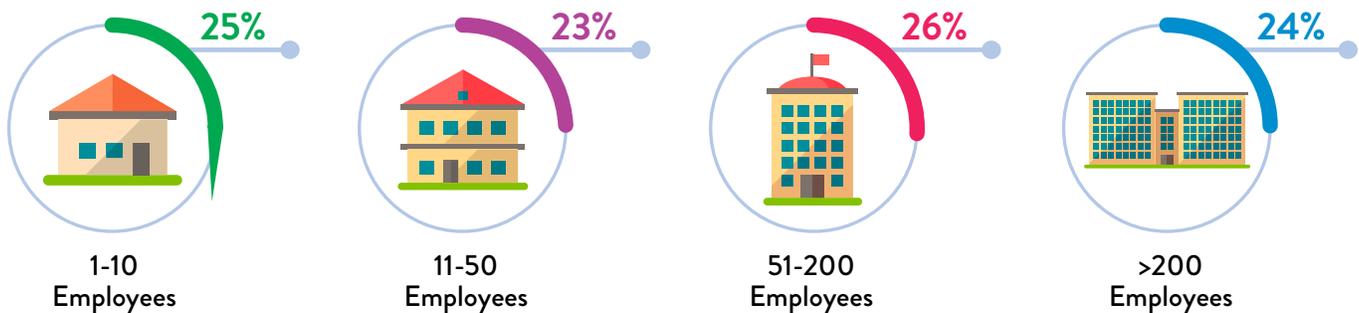
*We know a responsible and inclusive business unleashes innovation, makes our people proud, and builds trust with our customers and partners. Social Impact is a business imperative, essential to our success.*

**Jeremy Ford, Director of Global Giving, Dell, Inc.**

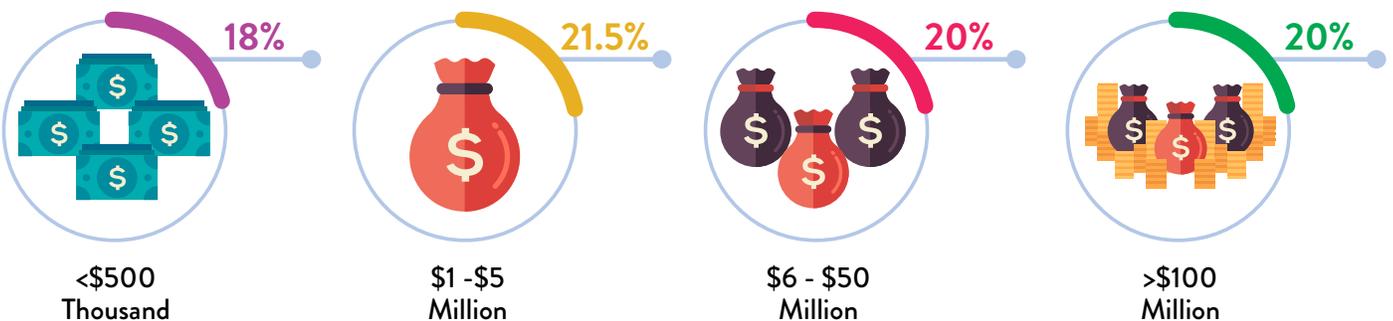
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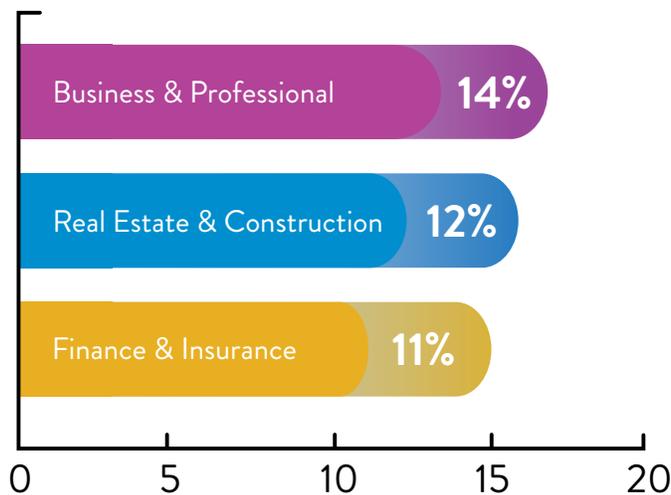
# The Companies

**FOR THE FIRST TIME IN OUR SURVEY**, the largest share of respondents represented mid-size companies with 51-200 employees (26 percent), followed by companies with 1-10 employees (25 percent) and companies with 11-50 employees (23 percent). Collectively, larger companies with more than 200 employees made up 24 percent of the survey group.



**ALSO A FIRST:** The highest percentages of companies in the survey reported annual revenues of \$1 million - \$5 million (21.5 percent), \$6 million - \$50 million (20 percent), and more than \$100 million (20 percent).





In regard to industry, the highest percentage of respondents identified as business & professional services (14 percent), followed by real estate & construction (12 percent) and finance & insurance organizations (11 percent).

## Methodology

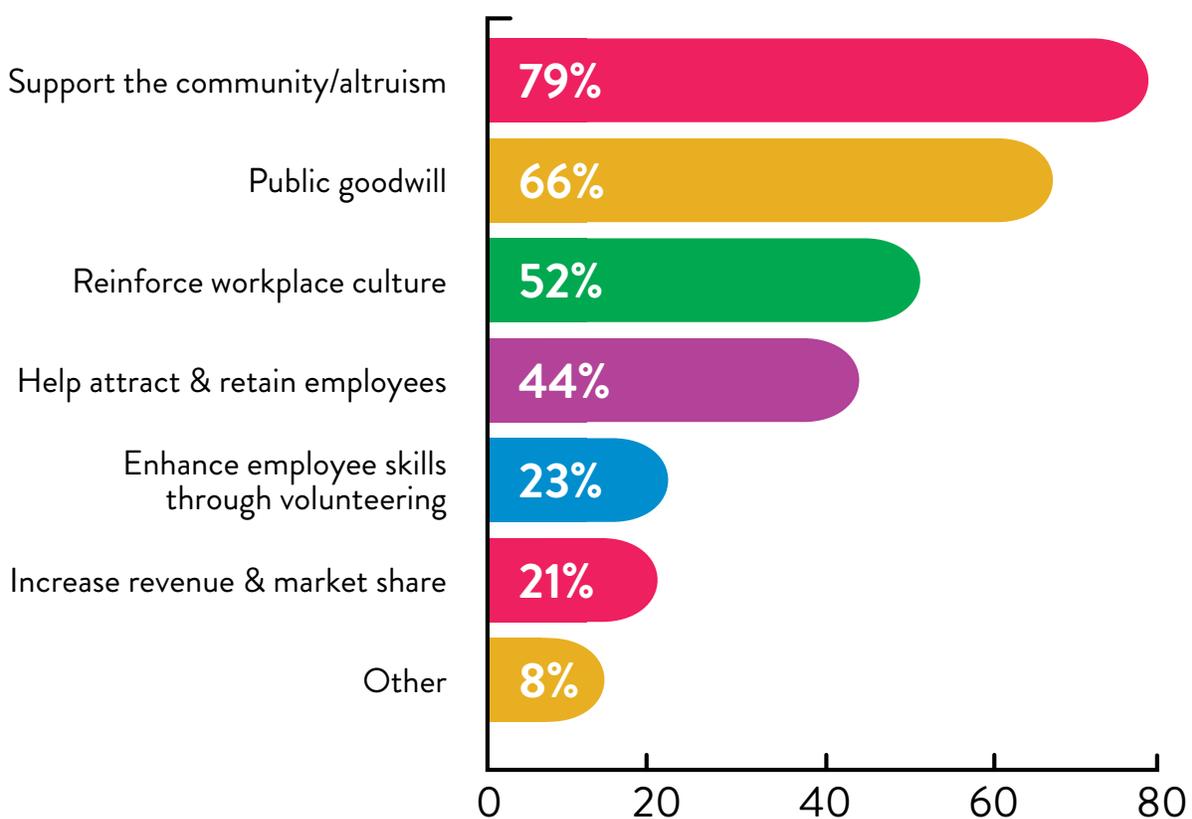
The Survey of Corporate Giving in Central Texas was conducted online from Jan. 28 – Feb. 28, 2019. Owners and representatives for companies in the Central Texas area were invited via email to take the 20-question survey using web-based survey provider SurveyMonkey.com. We received responses from 163 companies – 11 of which were excluded from our statistics because they indicated that they are not based (nor have a substantial presence) in Central Texas. The results from the remaining 152 responding organizations were compiled and analyzed for this report.

## Infographic

**Central Texas Companies: Philanthropy by the Numbers** provides a unique illustrated look at some key highlights from the 2019 Rodman Report. The infographic is available for download at [RodmanReport.com](http://RodmanReport.com).

# Question 1

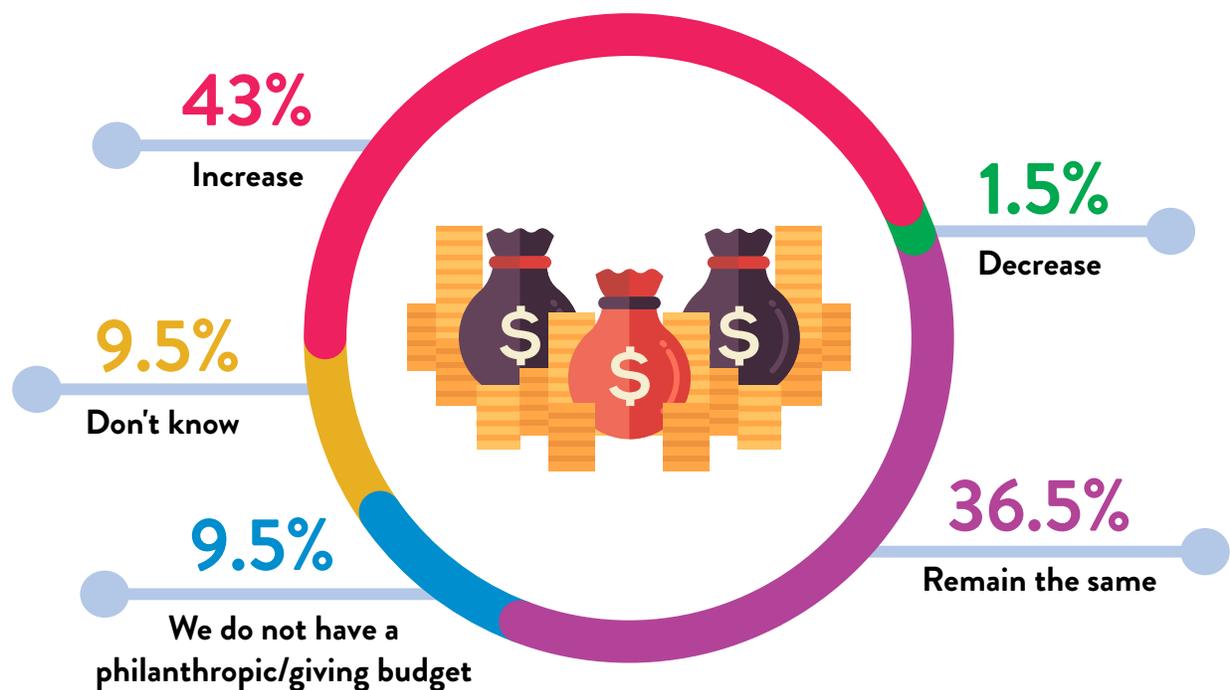
## What are the most important drivers behind your business's corporate giving/community investment?



In response to this new question, most companies included support for the community/altruism, public goodwill, and reinforcing workplace culture as the most important reasons for engaging in philanthropy. Some respondents also commented that they aim to increase education, align giving with their company's values, and promote entrepreneurship.

## Question 2

From 2017 to 2018, did your philanthropic/giving budget:

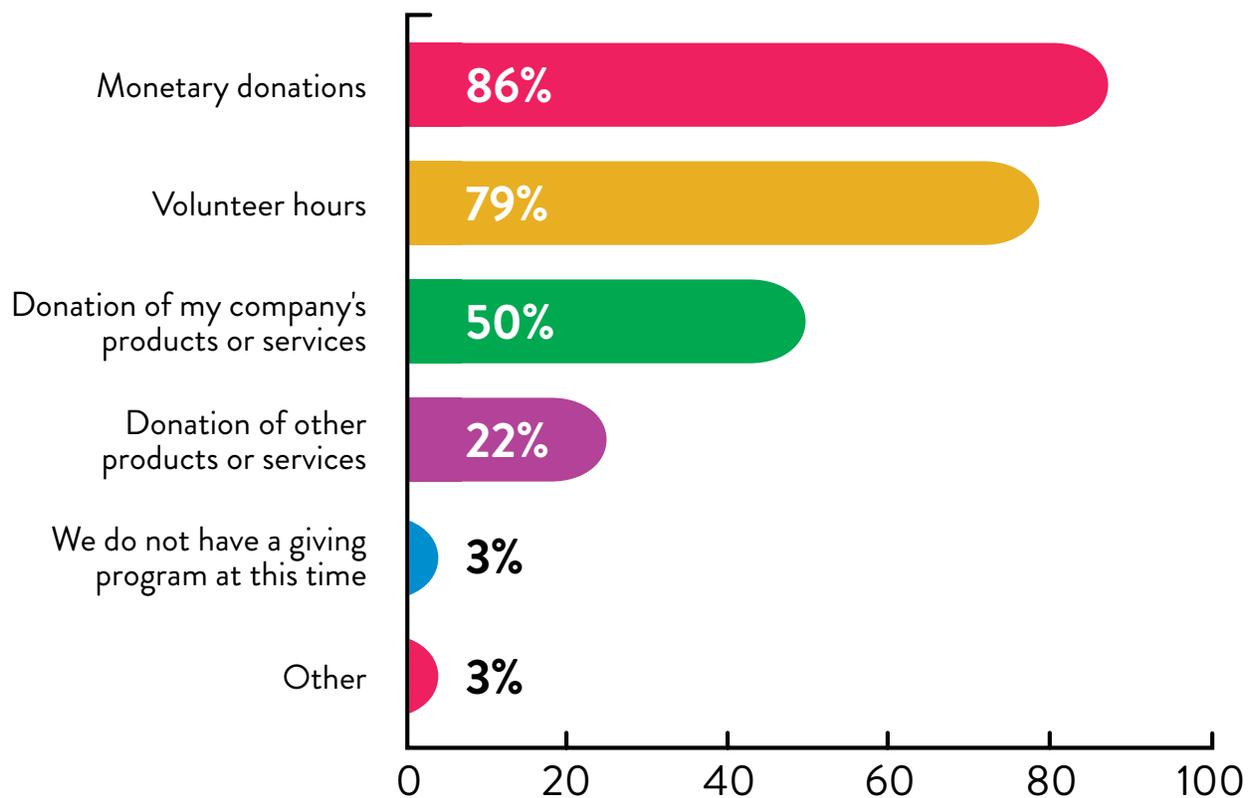


In previous studies, we asked a separate question: “Does your company have a philanthropic/giving budget?” We combined these questions to glean the same information.

Most companies have philanthropic/giving budgets, and the majority of respondents said their budgets either increased or stayed the same (43 percent and 36.5 percent, respectively) from 2017 to 2018.

# Question 3

## How does your organization give?



Consistent with previous surveys, the most highly cited methods of giving were monetary donations (86 percent) and volunteer hours (79 percent). Some respondents commented that they also give through mentoring and education, as well as advocacy.

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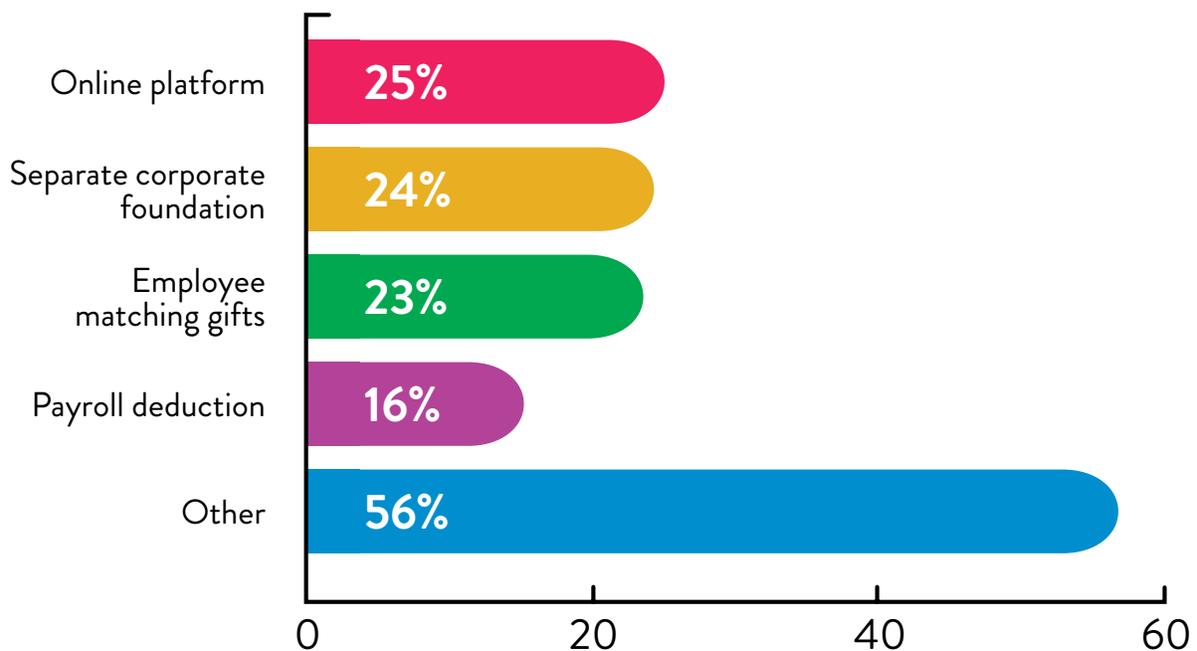
*At ParkandZoom and BarkandZoom, we provide airport related services to the local community and give back a portion of our profits to nonprofits that benefit the local community's underprivileged residents. By tying our donations to the amount of customers who join our Zoom Club for discounts, our customers become a part of our charitable giving.*

**Bradley S. Scott, President, Scott Airport Parking, LLC**

”

# Question 4

## How do you manage your corporate giving?



This is a new question, and we learned that there are various ways that companies manage their philanthropy. Along with online platforms, foundations, and matching gifts, some respondents commented that they have giving committees, giving directors, or manage philanthropy through their accounting departments.

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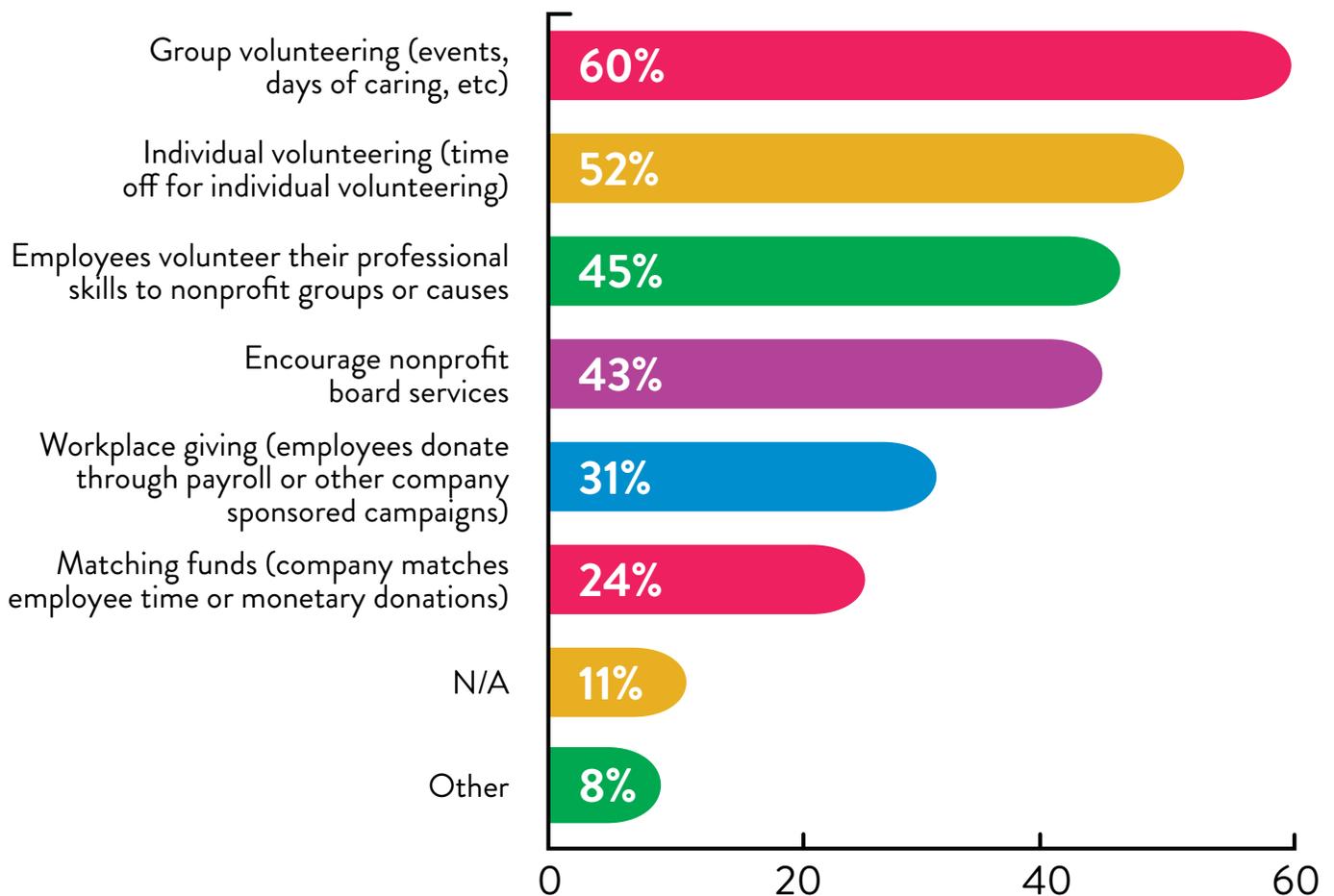
One of WP Engine’s core values is “Aspiring to Lead, Committed to Give Back” and we take this to heart. We believe that participating in community efforts allows our employees to lead by positive example and make a valuable impact to those around us. The company has an employee-led committee called “Give Back.” In every office, the Give Back committee brings opportunities for employees to directly impact the communities in which they live, ultimately helping them grow as good citizens and local leaders.

Eric H. Jones, VP of Global Communications, WP Engine

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## Question 5

### How do you engage employees in your philanthropy?

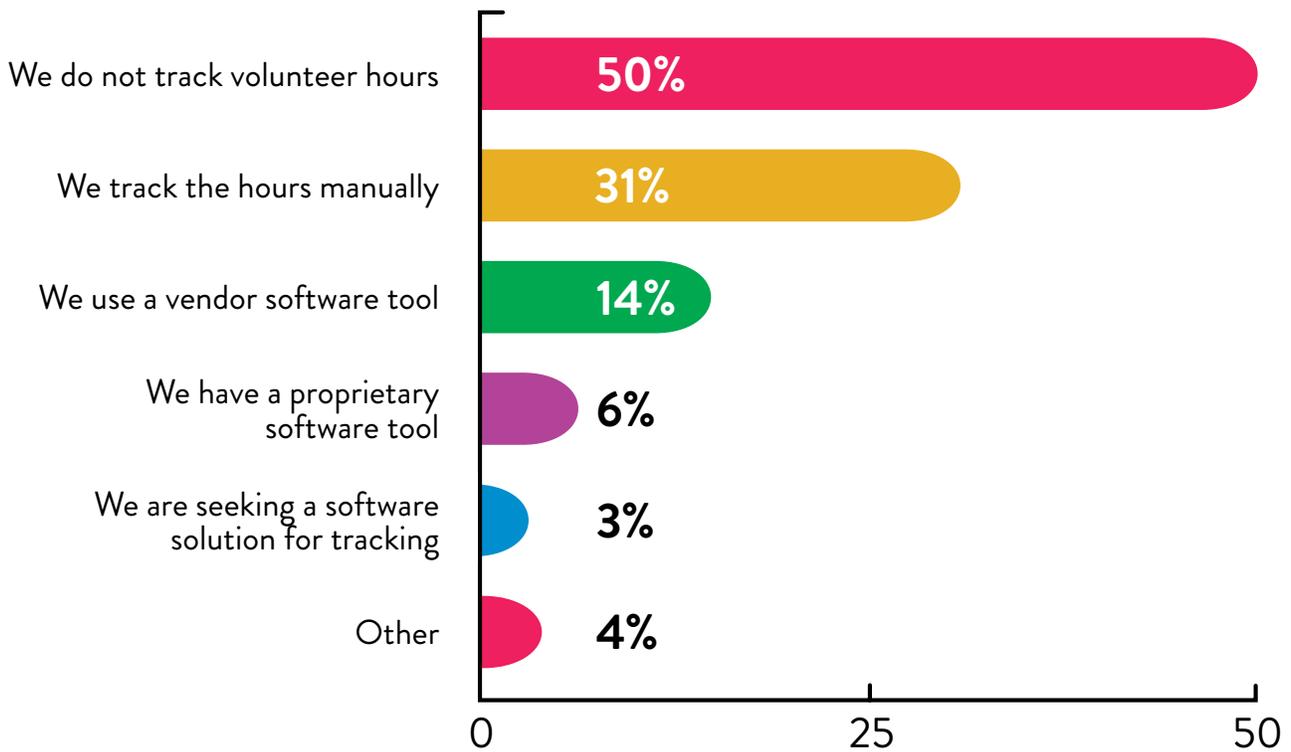


When it comes to employee engagement, group volunteering (events, days of caring, etc.) is still the leader, followed by individual volunteering (providing paid time off for employees to volunteer), encouraging employees to volunteer their professional skills to nonprofits, and encouraging nonprofit board service.

We must note that at 60 percent, group volunteering decreased from the 72 percent mark in last year's survey. It's important that business leaders remain committed to this form of engagement, as it has been demonstrated to increase employee morale and contribute other team-building benefits.

# Question 6

## How does your company track volunteer hours?



When it comes to employee volunteering, it's important to know how companies quantify their contributions. Half of the respondents in our survey said they do not track volunteer hours. Of those that do, most of them track their hours manually, followed by using vendor-provided or proprietary software.

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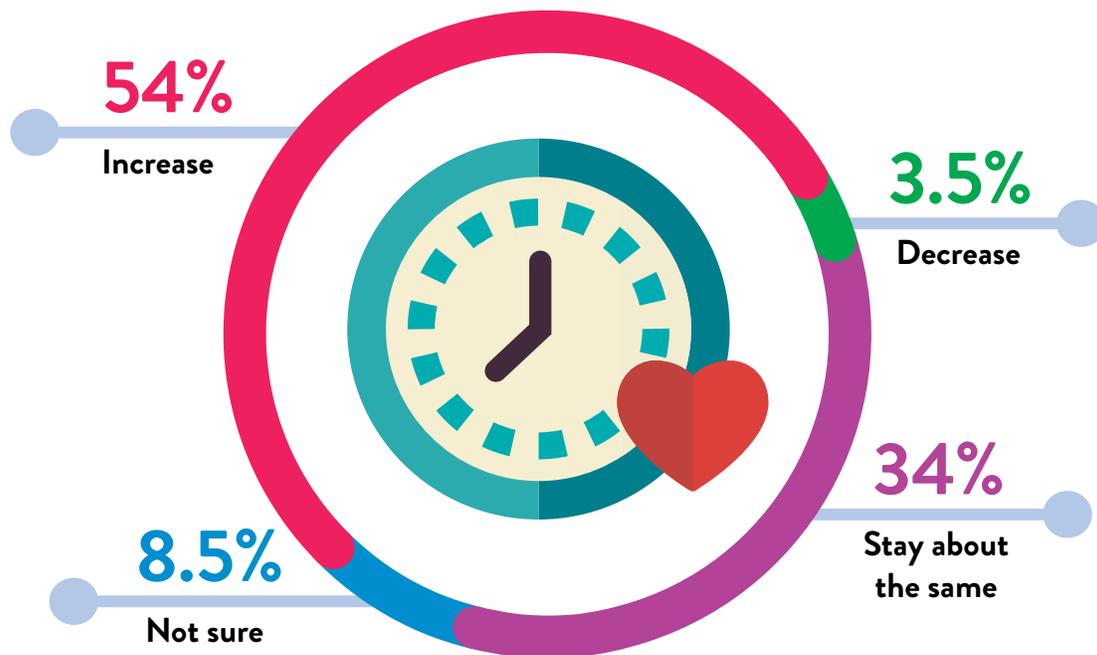
*We have a great giving & volunteer program, but we're always looking for best-practices to help us refine where we divide our efforts, how to best engage our unique workforce, and how to track these efforts.*

**Amanda Kuda, VP of Communication, Kerbey Lane Café**

”

## Question 7

From 2017 to 2018, did your company's volunteer hours:



Just over half of survey respondents said their company's volunteer hours increased last year, while about a third saw their hours remain about the same. Only a small percentage saw a decrease, which is good news for nonprofits that depend on volunteer help in various capacities.

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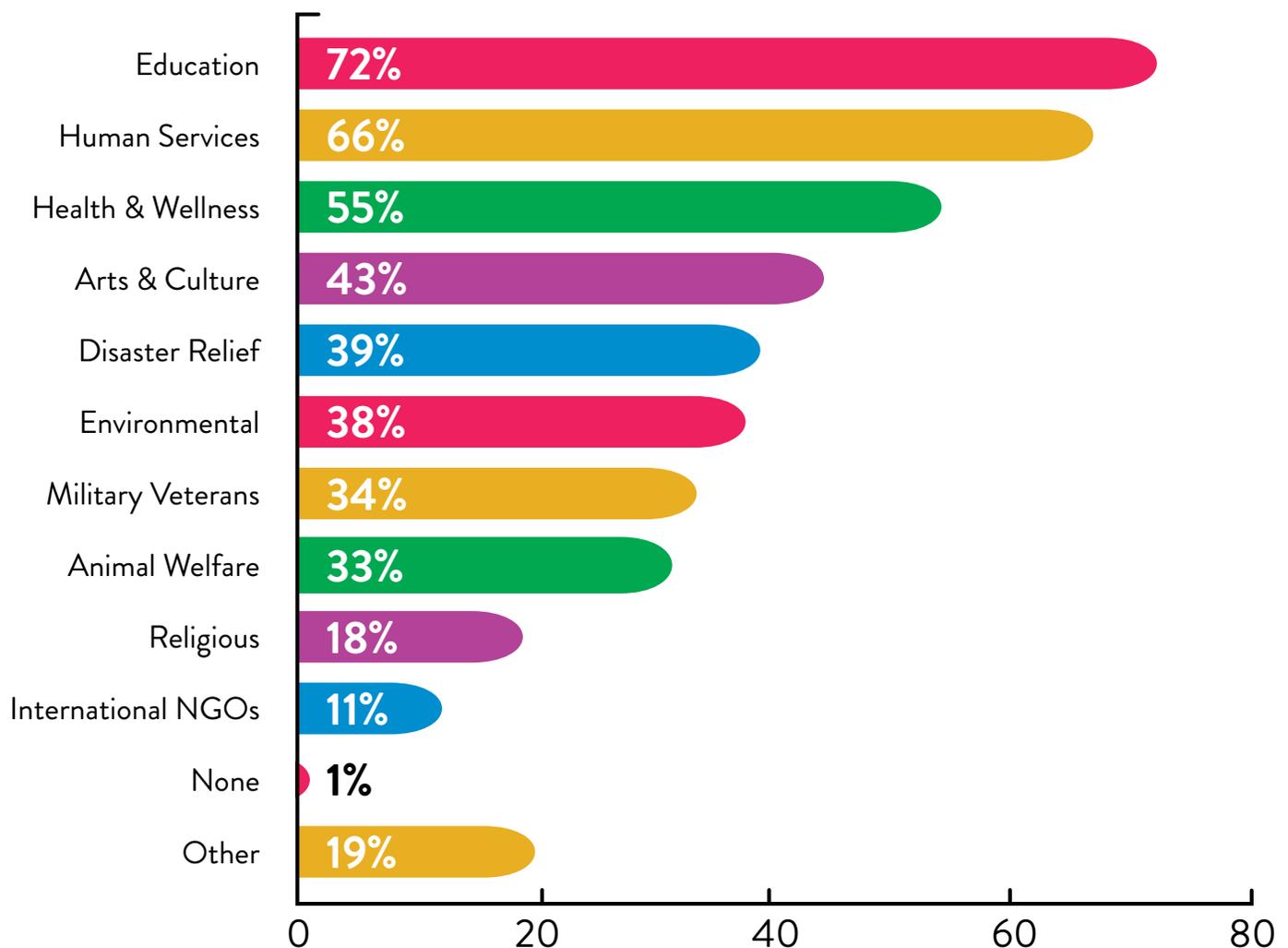
*Our community gives us so much every day – opportunities to succeed and to thrive. The least we can do is give back in a meaningful way to assist those that do not have the same opportunities. As a company, giving back to the community is considered a must.*

**Bobak J. Tehrany, P.E., PTOE, President, BOE Consulting Services, LLC**

”

## Question 8

### What type of organizations does your company support?



In line with each of our previous surveys, the types of nonprofits that companies are most likely to support are those involved in education, human services, and health and wellness.

They are least likely to support international non-governmental organizations (NGOs) and religious organizations.

## Question 9

**In 2018, did your company contribute funds and/or volunteer hours to assist victims of severe weather and flooding in Central Texas?**

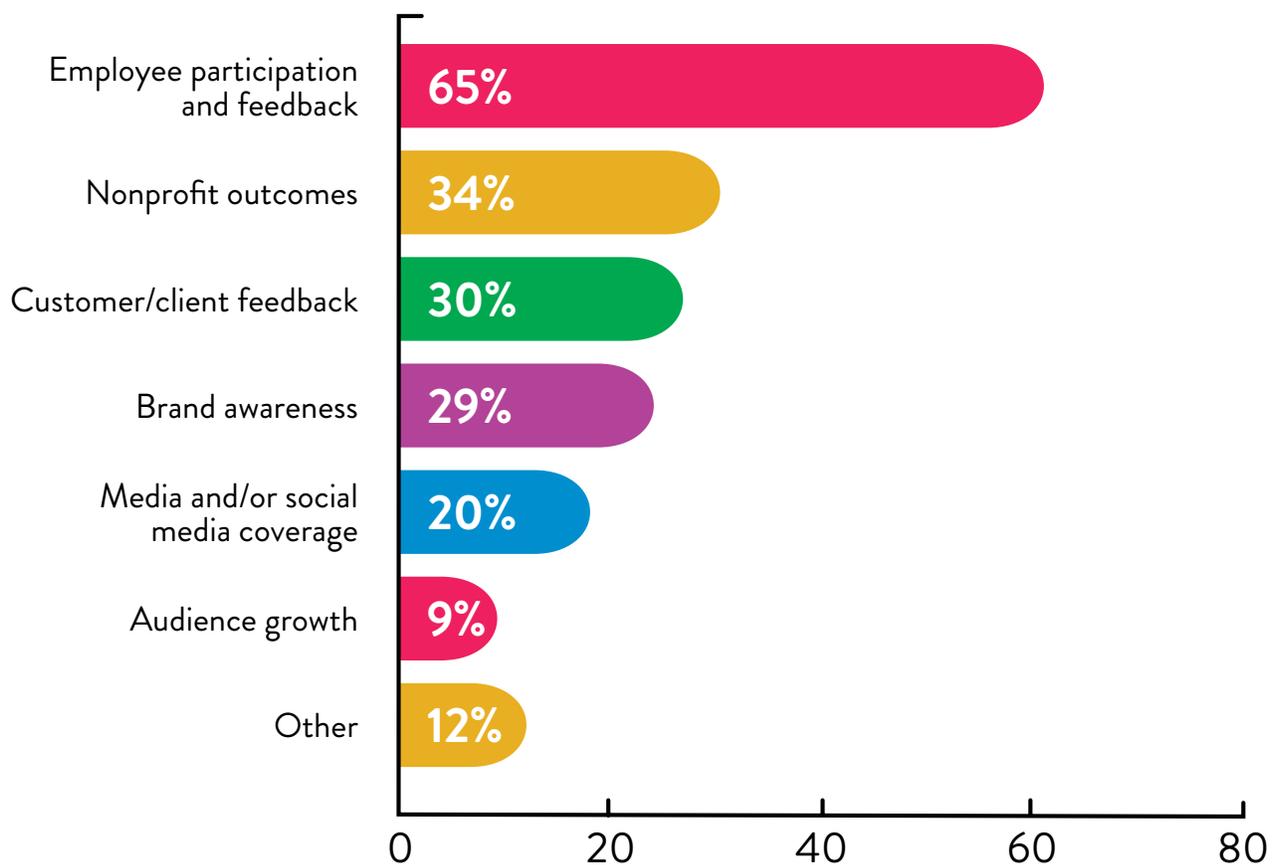


Several Central Texas communities were heavily impacted by damaging floods and severe weather last year. We wanted to know how many companies contributed specifically to assist victims of that situation.

The results were nearly split, as 45 percent of respondents said yes, 42 percent said no, and 13 percent weren't sure. It is worth remembering that some companies might already have their giving and/or causes to support already allocated for the year. This is a relevant issue, however, when it comes to measuring support for the community.

# Question 10

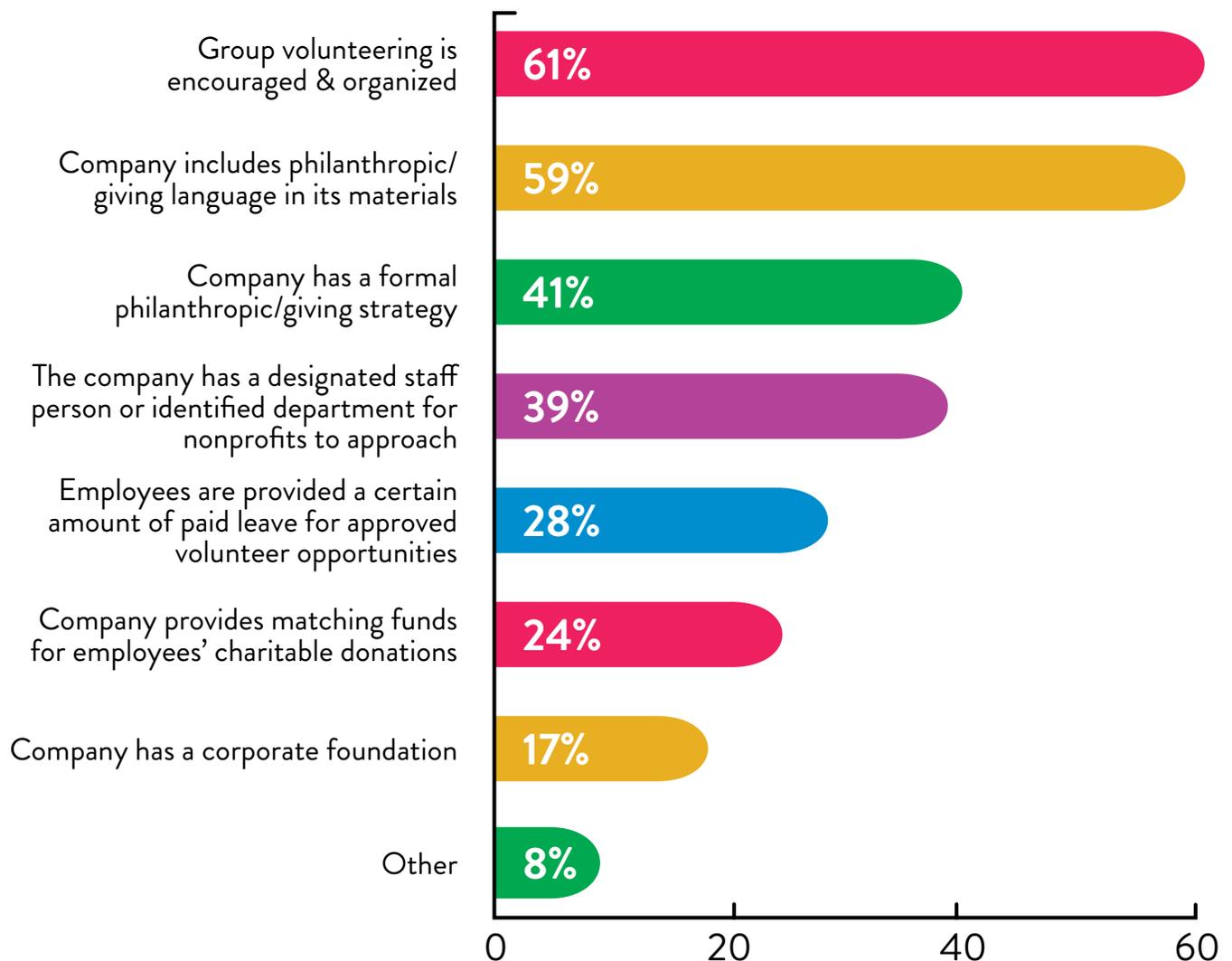
## How does your business measure the ROI or impact of its charitable investments?



This new question gets to the heart of understanding how companies measure success when it comes to philanthropy. The majority of them value employee participation and feedback. This is followed by nonprofit outcomes (“what did our support help accomplish?”), customer/client feedback, and increased brand awareness.

# Question 11

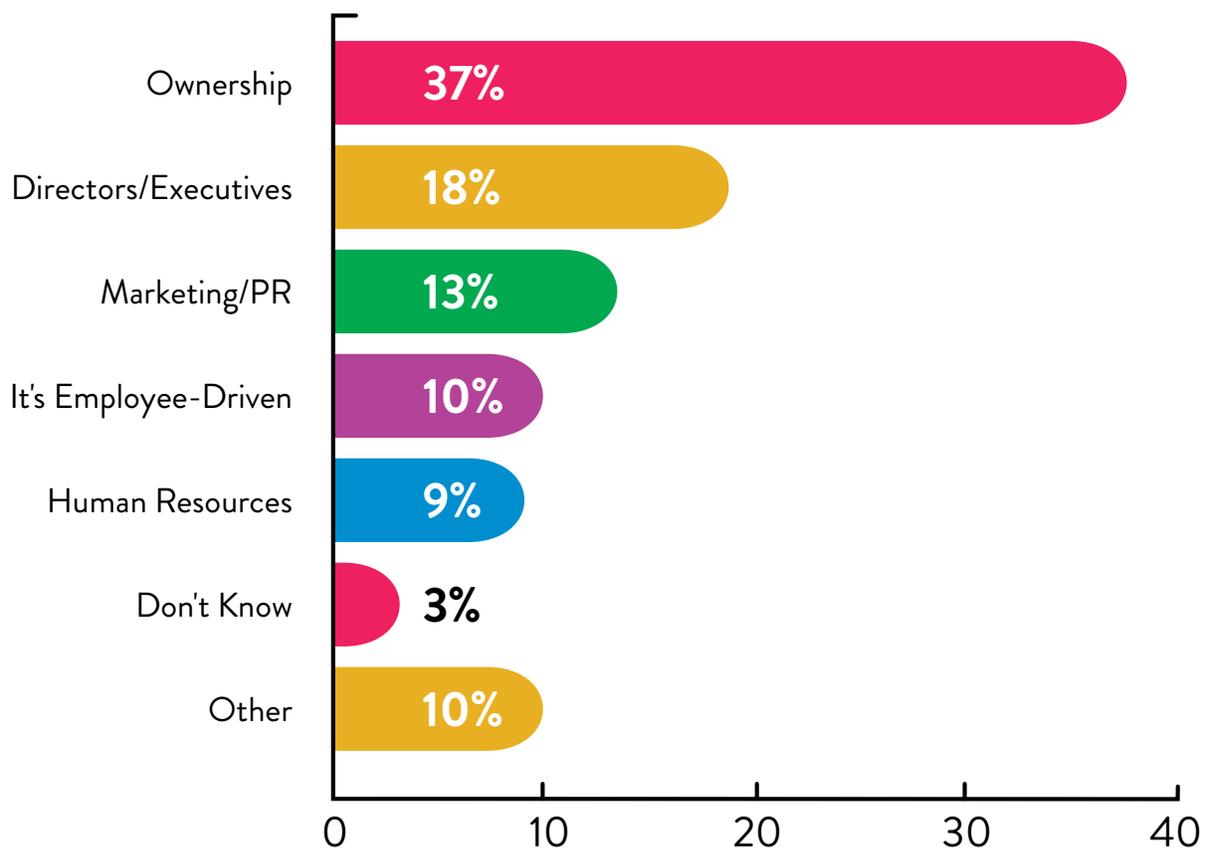
## How does your company maintain and/or promote a culture of giving within the organization?



For the majority of respondents, group volunteering is encouraged and organized, and the company includes philanthropic/giving language in the corporate value statement, employee handbook, and/or other materials. To a lesser degree, companies have formal philanthropic/giving strategies, and have designated staff persons or identified departments for nonprofits to approach when seeking donations.

## Question 12

### Who, or which department, spearheads your philanthropic/giving efforts?

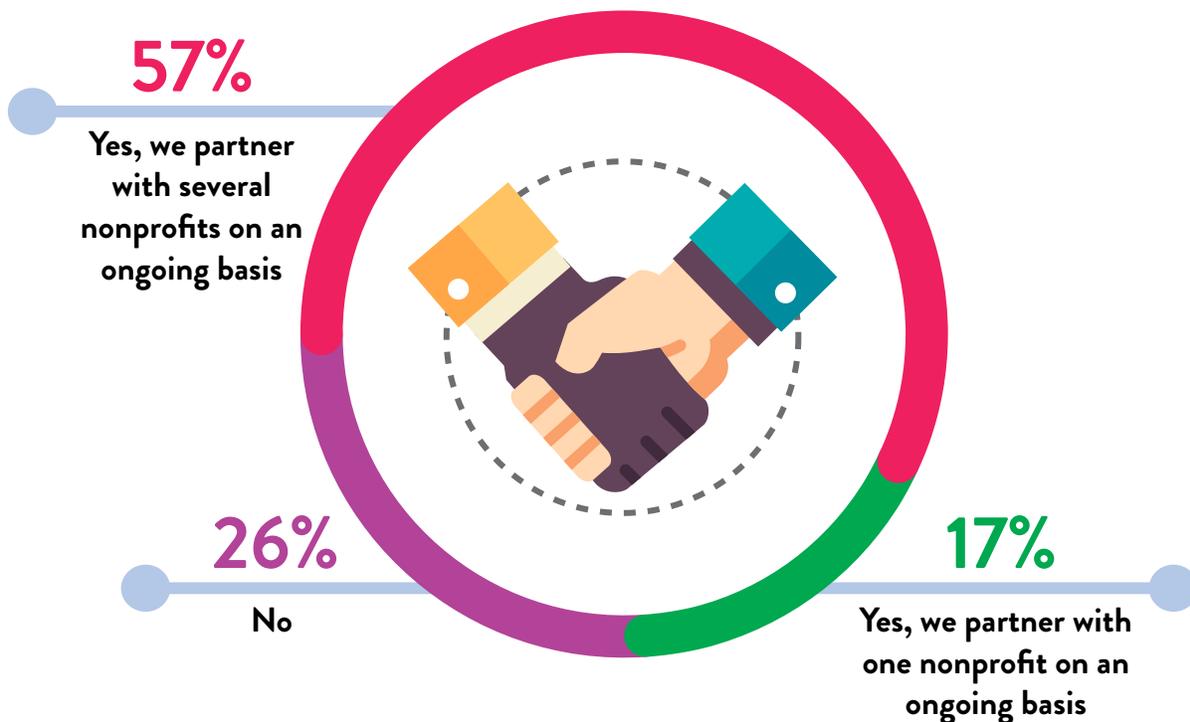


**THIS IS ONE OF THE MOST IMPORTANT QUESTIONS IN THE SURVEY**, as it helps nonprofits understand who the decision-makers are at companies when it comes to philanthropy. We found that ownership is still the most likely to lead philanthropy, followed by directors/executives, marketing/PR, employees, and HR.

Some respondents commented that they have a foundation board, giving committee, or that decisions are made through a collaborative process involving different roles/personnel.

## Question 13

Does your company have an ongoing partnership with a select nonprofit?



This new question found that more than half of companies partner with several nonprofits on an ongoing basis, while a small percentage partner with just one nonprofit organization. About a quarter of respondents said they don't engage in such partnerships.

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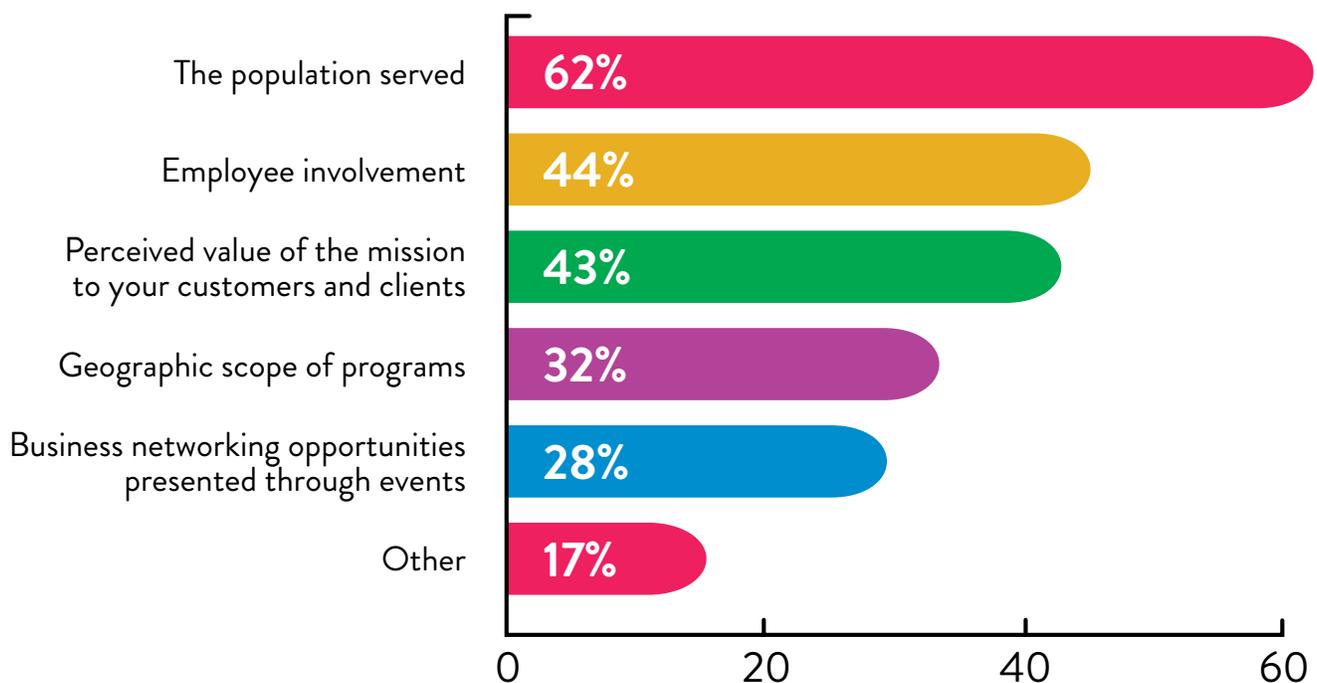
One of Higginbotham's primary corporate missions is giving back to our communities. It permeates our corporate culture & is consistent with our work w/ non-profit organizations. It is the backbone of our firm.

Curtis Page, Managing Director, Higginbotham

”

## Question 14

### What criteria do you use to select nonprofits to support?



This is another new question that is especially insightful for nonprofits. Companies said their most important criteria for giving is the population served, followed by employee involvement and the perceived value of the mission to customers and clients.

This demonstrates that nonprofits need to make an effort to be in tune with engagement strategies and other factors that are important to companies.

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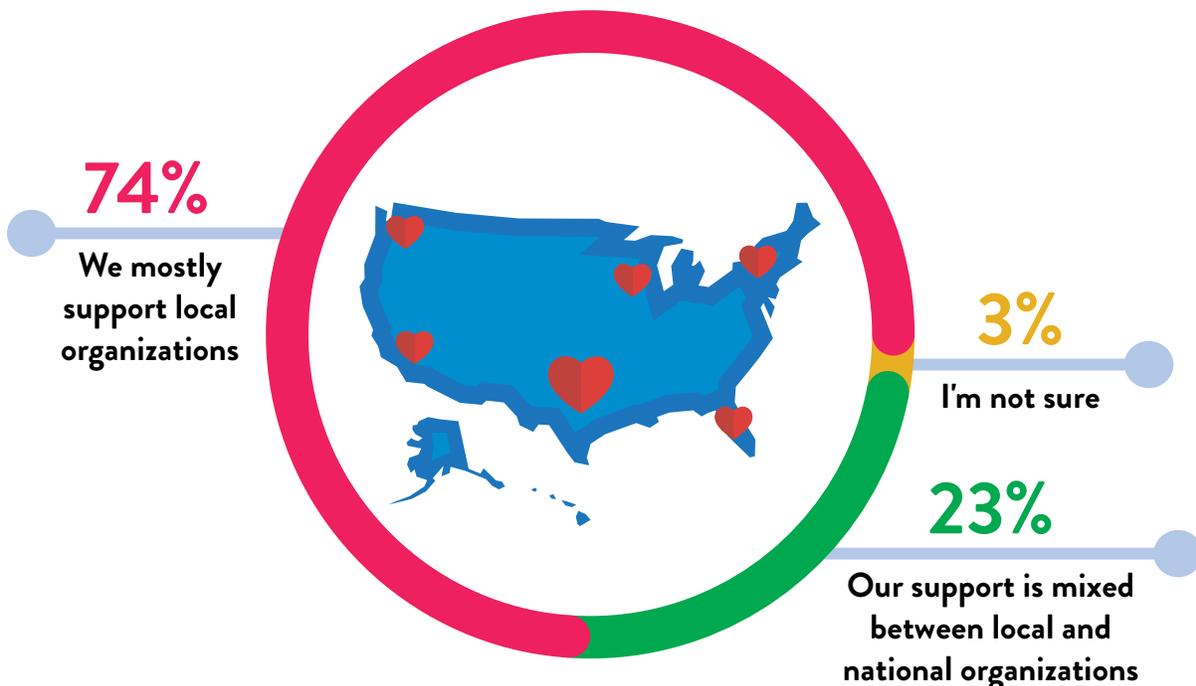
*The stated purpose of The Truluck's Restaurant Group is simply: We are here to make good things happen for other people. We believe our community is a vital part of this purpose, and that success unshared is failure. Employees at every level of the organization – including ownership – live this purpose daily by giving back to our community. Philanthropy is in the very DNA of our culture.*

Todd Alley, Director of Marketing, Truluck's Restaurant Group

”

## Question 15

### Does your company mostly support local or national nonprofit organizations?



We asked this new question to gauge local versus national support. Overwhelmingly, companies responded that they mostly support local organizations. About one-fourth support a mix of local and national nonprofits, and it's worth noting that none reported supporting only national organizations.

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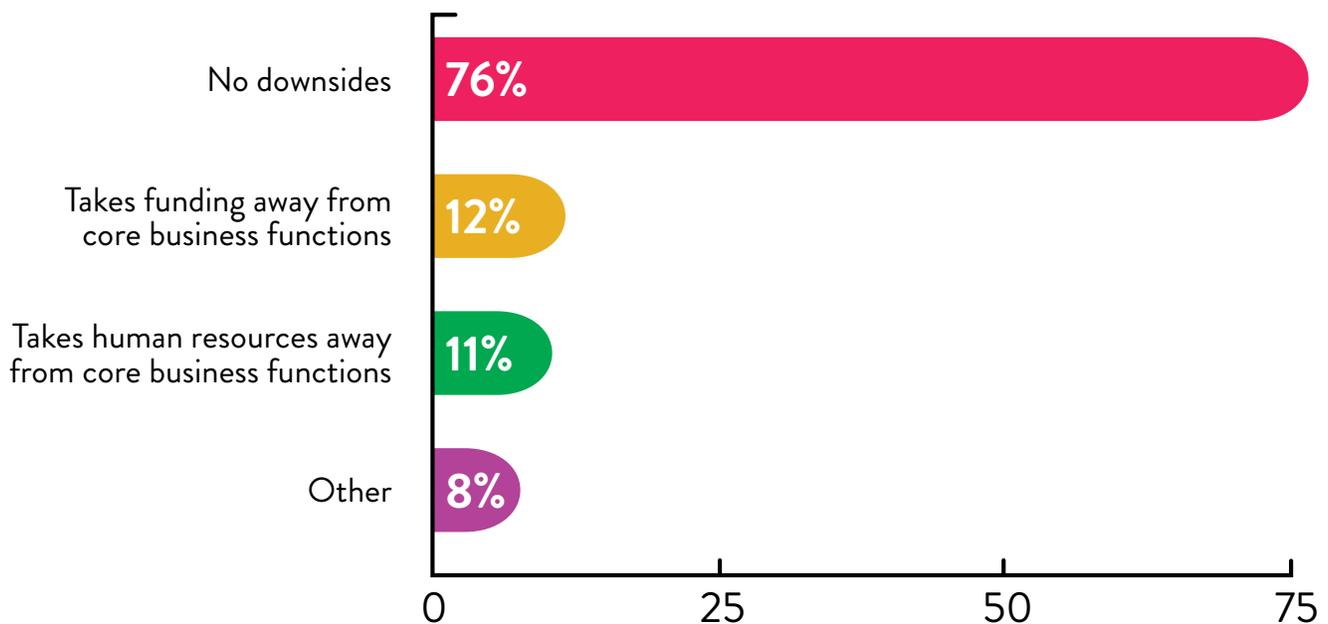
*We are always striving to do a better job of measuring impact, but many times the result that matters most is a feeling – does our business family truly understand our role in the community? Our company is built to be in business for decades, so making giving part of our responsibilities is an investment in our future as much as an altruistic endeavor.*

Joel M. Coffman, Communications Director, TyRex Group

”

## Question 16

### What do you perceive as downsides to corporate giving?



This is another new question, and we asked it to gain honest feedback about what some of the negative factors could be to corporate giving. Encouragingly, more than three-fourths of respondents said there are no downsides to their philanthropy. Nearly one-fourth of respondents, however, said it takes either funding or human resources away from core business functions.

One respondent commented: “Sometimes board members or charitable leadership behave badly. We have to end our relationship with them.” It’s important for nonprofit leaders to understand the factors that might hinder corporate philanthropy, and collaborate with business partners to make their involvement a win-win relationship.

# About Rodman & Associates

Rodman & Associates are seasoned professional philanthropic advisors dedicated to helping organizations, large and small, make their philanthropic mark.

## Rodman & Associates works with its corporate clients to:

- Clarify their philanthropic priorities and focus
- Identify strategies, giving vehicles and timing to best execute those giving goals
- Benchmark comparable philanthropic models
- Design and manage employee engagement programs
- Ensure the organization has the necessary talent to realize adopted strategies
- Assess and evaluate outcomes

We are experienced in helping organizations of all types and industries, from large publicly-traded companies to small businesses.

For more information and online resources, visit  
[www.RodmanAssociates.com](http://www.RodmanAssociates.com)