



# business of change

**A RESOURCE GUIDE**

for corporate-nonprofit collaboration

**Through our partnership with Carbonfund.org,**  
we have calculated and offset the carbon footprint generated by the  
production and distribution of our Resource Guide and CD. This  
took into account all paper, printing, materials, and shipping of the  
guide. Carbonfund.org is the leading nonprofit carbon offset and  
climate solutions organization. Learn more at [www.carbonfund.org](http://www.carbonfund.org)

# Business of Change

A RESOURCE GUIDE FOR CORPORATE-NONPROFIT COLLABORATION

## Authorship

**The *Business of Change* was researched, written and produced by members of the Donor Resources team of the Gill Foundation and the Social Innovation team at Weber Shandwick. Many other people both inside, and outside, our organizations gave instrumental and creative advice. We give special thanks and acknowledgement to the Social Innovation Fellows and Advisory Board members listed on the following pages.**

### Gill Foundation

Established in 1994, the Gill Foundation's mission is to secure equal opportunity for all Americans, regardless of sexual orientation or gender expression. In its 15-year existence, the Gill Foundation has become one of the nation's largest private foundations focused on lesbian, gay, bisexual, and transgender (LGBT) civil rights. During these years, the Foundation has invested more than \$162 million to support programs and nonprofit organizations across the country that share its commitment to equal rights for lesbian, gay, bisexual, and transgender Americans.

The Foundation works to engage and educate donors to provide the effective, large-scale financial support necessary to achieve equality, and joins with like-minded organizations and individuals to put forward a shared vision for doing so. The Foundation works to broaden the base of LGBT and allied supporters—individual, institutional and corporate—that are knowledgeable about local, state and national LGBT nonprofits and the importance of their work. In pursuit of this goal, the Donor Resources team at the Gill Foundation uses a variety of tactics including hosting signature OutGiving conferences, donor salons and personal funder meetings and encouraging the formation of giving circles.

The Foundation strives to increase support for equality by improving communications with the American people, and by raising awareness of the contributions made by gay men and lesbians to society. Today, as ever, the Gill Foundation remains invested in equality.

[www.gillfoundation.org](http://www.gillfoundation.org)



### Weber Shandwick

Weber Shandwick is a leading global public relations agency with offices in 77 markets around the world. The firm's success is built on its deep commitment to client service, creativity, collaboration and harnessing the power of Advocates—engaging stakeholders in new and creative ways to build brands and reputation. Weber Shandwick provides strategy and execution across practices such as consumer marketing, healthcare, technology, public affairs, corporate/financial and crisis management. Its specialized services include digital/social media, advocacy advertising, market research, and corporate responsibility. Weber Shandwick was recognized as PRWeek's 2009 Global Agency Report Card Gold Medal Winner, named Global Agency of the Year by The Holmes Report and Large PR Firm of the Year by PR News in 2008. The firm also won the United Nations Grand Award for Outstanding Achievement in Public Relations for a lifestyles educational campaign in India.

Social Innovation @ Weber Shandwick is a global specialty group and think tank that delivers exceptional value to clients and partners interested in corporate responsibility, sustainability, strategic philanthropy, cause marketing and advancing social issues. Our mission is to help clients embed and communicate innovative programs and principles across their work, contribute to the public debate on key issues affecting our world and show return on investment. Through an approach known as mob-sourcing—or moso—the team uses a collaborative digital platform to discuss, debate and develop best-in-class ideas for clients via three offerings: Planet 2050, Social Impact and the Greenhouse. Weber Shandwick is part of the Interpublic Group (NYSE: IPG).

[www.webershandwick.com](http://www.webershandwick.com)



# Acknowledgments

## **Business of Change**

### **Project Team**

CHAD BOETTCHER\*  
*Senior Vice President*  
*Social Innovation*  
*Weber Shandwick*  
cboettcher@webershandwick.com

ERIC DOUGLAS\*  
*Senior Officer*  
*Donor Resources*  
*Gill Foundation*  
ericd@gillfoundation.org

PATRICIA EVERT\*  
*Vice President*  
*Donor Resources*  
*Gill Foundation*  
patriciae@gillfoundation.org

PAUL MASSEY\*  
*Senior Vice President*  
*Management Supervisor*  
*Weber Shandwick*  
pmassey@webershandwick.com

ARIES DELA CRUZ  
*Social Innovation Fellow*

REBECCA PYNE  
*Social Innovation Fellow*

JACOB WELDON  
*Social Innovation Fellow*

TANYA FEINSTEIN  
*Director*  
*KRC Research*

AMY JUARISTI  
*Group Manager*  
*Global Strategic Media Group*  
*Weber Shandwick*

AMY LEONARDI  
*Vice President*  
*Creative Studio*  
*Weber Shandwick*

## **Advisory Board**

YVETTE C. BURTON, PH.D.  
*Business Development Executive, GLBT and*  
*Human Capital Management Segments*  
*IBM Corporation*

GREG CAMERON  
*Executive Vice President and*  
*Chief Development Officer*  
*WTTW*

DARYL HERRSCHAFT  
*Director, HRC Workplace Project*  
*Human Rights Campaign*

KEVIN JONES  
*Deputy Director*  
*Out & Equal*

CLAIRE LYONS  
*Manager, Global Grant Portfolios*  
*PepsiCo Foundation*

DANIEL J. OSHEYACK  
*Vice President, Philanthropic Investments*  
*Time Warner Inc.*

PATRICK M. SHEAHAN  
*Executive Director, Public Affairs*  
*UBS Investment Bank*

JOHN WESTFALL-KWONG  
*Director of Development*  
*Lambda Legal*

**\* For more information on this resource guide, contact one of our Team Leaders.**

## Additional Thanks

We want to thank the following individuals who attended our meetings or agreed to be interviewed for this project and whose experience and insights provided us with invaluable direction in the development of this resource guide.

Audrey Atkins <i>Frito Lay</i>	Cordey Lash <i>InterContinental Hotels Group</i>
Lee Anderson <i>General Mills</i>	Daniel Lee <i>Levi Strauss Foundation</i>
Jarrett Tomas Barrios <i>GLAAD</i>	Dean Marks <i>Warner Brothers Entertainment Inc.</i>
Jim Bennett <i>Lambda Legal</i>	Jean-Marie Navetta <i>PFLAG</i>
A. Lynne Bowman <i>Equality Ohio</i>	Graham Nolan <i>Starcom USA</i>
George Carrancho <i>American Airlines</i>	Matt O'Grady <i>Taproot Foundation</i>
Chris Crespo <i>Ernst &amp; Young</i>	Gary Osifichin <i>Cadbury Adams</i>
Christopher Dumm <i>Hetrick-Martin Institute</i>	Vivian L. Polak <i>Dewey &amp; LeBoeuf, LLP</i>
Jeff Friedman <i>Jack Morton</i>	Robert Rizzo <i>Sara Lee Foundation</i>
Leslie J. Gabel-Brett <i>Lambda Legal</i>	Judy E. Schaefer <i>Sara Lee Foundation</i>
Kari Hamon <i>Time Warner Inc.</i>	Todd Sears <i>Credit Suisse</i>
Jamie Hartman <i>Taproot Foundation</i>	Timothy Showalter-Loch <i>Best Buy Co, Inc.</i>
Juan Herrera <i>MTV Networks</i>	Bradley Silver <i>Time Warner Inc.</i>
Jody Huckaby <i>PFLAG</i>	Michael Silverman <i>Transgender Legal Defense &amp; Education Fund</i>
Tasha Kersey <i>Credit Suisse</i>	Modesto Valle <i>Center on Halsted</i>
Kevin King <i>KPMG IT</i>	Marla J. Williams <i>Holme Roberts &amp; Owen LLP</i>
Thomas Koveleskie <i>NGLCCNY</i>	Davon Woodard <i>Center on Halsted</i>
Michelle Kristel <i>In the Life Media</i>	Helga Ying <i>Levi Strauss &amp; Co</i>
Joshua Lamont <i>amFAR</i>	

Our thanks also to the hundreds of nonprofit and corporate professionals who took the time to complete our online surveys. Their responses have helped to shape the focus and content of this resource guide.



# What You Need to Know Before Using this Guide

## THE STARTING POINT

This guide is meant to be a starting point for enhancing collaborative dialogue between nonprofits and corporations. Our research shows that corporate philanthropy is ever-evolving. Society now expects businesses to take a more active role in social and political issues than it did five years ago. The good news is that corporate leaders understand that strategic philanthropy programs can be an effective way to meet those expectations and are assigning greater importance to them.

However, the importance of making an effective business case for philanthropic giving presents both challenges and opportunities. It is indeed a *different way of doing business* and one that requires more focus and planning on the part of both the private and nonprofit sectors.

This guide brings together the research undertaken by our team of seasoned nonprofit and corporate professionals, combined with the fresh perspective of our college research fellows. It is a true multi-generational collaboration.

We have distilled a wealth of information into a guide that is user-friendly and that offers practical and actionable recommendations for nonprofits and corporations. Throughout this report, we feature concrete examples of successful partnerships—large and small—that can serve as an inspiration for your own work. While many of our case studies focus on companies and nonprofits working in the lesbian, gay, bisexual and transgender (LGBT) space—a social justice movement that presents its own unique challenges—the content of the guide transcends the issue area and presents best practices and key learnings for any nonprofit-corporate partnership.

We have noted the importance for nonprofits to find an internal champion working at their partner companies who will help to navigate the corporate culture. We acknowledge that sometimes it can be difficult when a company publicly supports LGBT equality, and they need to have the infrastructure to weather the storm.

And, while the involvement of the CEO is a critical component of an effective philanthropic program, we have noted the power of the individual employee to influence change. In the end, it is about people connecting with each other and embracing a shared commitment to the *Business of Change*.

We have packed this information into a compact binder, and a complementary CD, which we encourage you to share with your colleagues so they too can play a role in the development of new strategic partnerships.



This guide brings together the research undertaken by our team of seasoned nonprofit and corporate professionals, combined with the fresh perspective of our college research fellows. It is a true multi-generational collaboration.



## WILL THIS GUIDE HELP ME?

We hope that everyone reading this guide will find the content valuable. Ultimately, we recognize that it is up to you to decide what will be useful for you and how you can incorporate our recommendations into your programs. Only you will be able to determine how much time you can invest in establishing strategic partnerships relative to your resources.

The one thing we know for sure is that forging, building and sustaining relationships takes *time*. There is no quick fix or magic bullet here. But the value of these partnerships can be priceless.



### Research Informed Our Recommendations

Research (not our intuition) has informed our recommendations in this resource guide. Given the rapidly changing landscape of corporate philanthropy, we have accessed the most current data—both quantitative and qualitative—from a variety of sources. Please see the bibliography at the end of the guide.



### Terminology

As part of the changing philanthropy paradigm, terminology is changing too. Some businesses refer to their partnerships with the social sector as corporate philanthropy, others as corporate giving programs and more recently, as philanthropic investments. For the purposes of this guide, we have chosen to use the term *corporate philanthropy*. We will use that terminology even when referring to nonprofits located outside of major urban areas that may be leveraging partnerships with local businesses, not global corporations. We applaud all partnerships that foster collaboration between the private and public sectors.



### Next Steps

We are excited to share this information with you. However, in light of the rapidly changing dynamic between the public and private sectors, there is continued work to be done. Our next step is to develop a web platform for this guide, from which we hope to create a social networking structure where nonprofit and corporate professionals can use real-time micro-blogging to share ideas and solve problems. The more good minds and resources we bring to the table, the better chance we have of developing innovative partnerships.



### Tell Us Your Stories

We want to hear from you. For generations, storytelling has been used as a means of educating and inspiring others. Tell us about your partnerships, so we can learn together. Please send stories of your unique nonprofit-corporate collaborations to Patricia Evert at [patriciae@gillfoundation.org](mailto:patriciae@gillfoundation.org).



**A STRATEGIC AND FOCUSED  
CORPORATE PHILANTHROPY  
PROGRAM CAN BE A VIABLE  
AND IMPORTANT COMPONENT  
OF A HEALTHY BUSINESS.**

*—Michael I. Roth  
Chairman & CEO  
Interpublic Group*

# Contents

<b>01</b>	Authorship
<b>02</b>	Acknowledgments
<b>03</b>	Additional Thanks
<b>04</b>	What You Need to Know Before Using This Guide
<b>07</b>	Table of Contents
<b>08</b>	Introduction
<b>11</b>	Chapter 1 The Landscape: Evolution of Corporate Philanthropy
<b>21</b>	Chapter 2 Surveying the Field: 2009 <i>Business of Change</i> Survey Results
<b>51</b>	Chapter 3 A Guiding Glossary: Terms from the Landscape
<b>63</b>	Chapter 4 Rating Equality: Organizations and Indices
<b>73</b>	Chapter 5 Effective Partnerships: 110 Questions to Consider
<b>87</b>	Chapter 6 Case Studies: Profiles in Corporate-Nonprofit Partnerships
<b>104</b>	Bibliography



**IF WE ONLY HAVE GREAT COMPANIES, WE WILL MERELY HAVE A PROSPEROUS SOCIETY, NOT A GREAT ONE. ECONOMIC GROWTH AND POWER ARE THE MEANS, NOT THE DEFINITION OF A GREAT NATION.**

—Jim Collins  
Author and Business Expert  
*Good to Great and the Social Sectors*  
*Why Business Thinking is Not the Answer*

# Introduction

The business of advancing equality requires a well-funded, robust network of LGBT and allied organizations working toward that goal. To that end, nonprofits must engage and cultivate an active and diverse support base that includes not only individuals and foundations, but also *strategic partnerships with corporations*.

In recent years, corporations have been analyzing ways to maximize both the social and business benefits of corporate philanthropic programs. Understanding the unique challenges facing the nonprofit sector, we wanted to understand what this *new way of doing business* meant.

In 2008, the Gill Foundation began meeting with leaders in the corporate community to explore the changing corporate philanthropy paradigm. It became clear that there needed to be some kind of guide that would provide nonprofits and corporations with actionable and practical recommendations to help foster strategic connections between the two sectors.

To help us examine the changing landscape, the Gill Foundation formed a unique partnership with global public relations firm Weber Shandwick, and together we created the 2009 Social Innovation Fellowship Program. We recruited three recent college graduates from Columbia University and Harvard University to serve as our research fellows. All had been leaders for LGBT rights on their campuses.

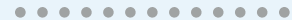
We also assembled an advisory board comprised of leading advocates from the nonprofit and corporate communities to help guide the project. Our goal was to accumulate and distill best practices and innovative approaches on how nonprofits and businesses work together to promote *investment* in the LGBT movement.



The current economic climate has forced corporations to clarify their philanthropic foci. And, despite financial uncertainty, corporate leaders attending the 2009 Committee Encouraging Corporate Philanthropy (CECP) conference acknowledged their continued commitment to invest in philanthropic initiatives that have positive impacts within and across communities.<sup>1</sup> They cite an intention to nurture nonprofit relationships, and are looking to offset reduced cash contributions by offering a broader array of resources including corporate matches, product donations, pro bono professional services and volunteer hours, use of facilities, access to in-house printing resources, corporate training programs, and more. We see this as an opportunity to develop more substantive nonprofit-corporate relationships that will thrive as economic conditions improve.

Philanthropy is about sparking the passion that exists within all human beings to want to help their fellow human beings; to believe that we can leave our country and our world better than we found it. That is why we believe in collaboration. It is a natural extension of our work to create a world that is fully equal and inclusive. The more good minds and resources that we can bring to the table, the better off equality efforts will be.

We offer this guide as a starting point to a collaborative dialogue. We have no illusions that this guide is perfect, but we believe it is different from anything that has been put together before. Given the rapidly changing dynamic between the social and private sectors, we hope to challenge both nonprofits and corporations to seize opportunities to empower their people to drive change. The *Business of Change* requires that we all take action and partner together. It is not just the *right* thing to do; it is the *smart* thing to do.



They cite an intention to nurture nonprofit relationships, and are looking to offset reduced cash contributions by offering a broader array of resources including corporate matches, product donations, pro bono professional services and volunteer hours, use of facilities, access to in-house printing resources, corporate training programs, and more.



<sup>1</sup> CECP Board of Boards CEO Conference Executive Report. CECP 2009



**THE BUSINESS OF ADVANCING EQUALITY  
REQUIRES A WELL-FUNDED, ROBUST NETWORK OF  
LGBT AND ALLIED ORGANIZATIONS WORKING  
TOWARD THAT GOAL. TO THAT END, NONPROFITS  
MUST ENGAGE AND CULTIVATE AN ACTIVE AND  
DIVERSE SUPPORT BASE THAT INCLUDES NOT ONLY  
INDIVIDUALS AND FOUNDATIONS, BUT ALSO  
STRATEGIC PARTNERSHIPS WITH CORPORATIONS.**

“ I helped to start CECP with the belief that corporate America could be a force for good in society.

—Paul Newman, Founding Co-Chair  
Committee Encouraging Corporate Philanthropy<sup>1</sup>

# The Landscape: Evolution of Corporate Philanthropy

## A CHANGING SOCIAL CONTRACT

The corporate world has always had a contract with society, but the dynamic of that relationship is rapidly changing. As recently as the 1980s, companies believed that by making cash donations to hometown charities, they were administering effective philanthropy that would help fulfill their social contracts. Today, society's expectations have changed dramatically.

Consumers now have more ability to put pressure on companies to contribute to the public good. Shareholders are exerting pressure to increase companies' social investment. And the news media, employees, community activists and nonprofit organizations are all increasing attention on what companies give and how they give it. All of these groups can influence, and may even redefine, the social contract and what it means to a company to fulfill or exceed it.

–67% of US consumers continue to believe “it is important to purchase products with social and environmental benefits.”<sup>2</sup>

–51% say they are “willing to pay more” for those kinds of products.<sup>3</sup>

“Fifteen years ago, responsible shareholders knocked on the doors of corporate America and asked companies to add *no discrimination on sexual orientation* to

<sup>1</sup> CECP website: [corporatephilanthropy.org](http://corporatephilanthropy.org)

<sup>2</sup> Conscious Consumer Report, BBMG, 2009

<sup>3</sup> Ibid



Giving back to the community matters to employees and, therefore, helps to attract and retain good people.



# 84%

84% OF CORPORATE EXECUTIVES BELIEVE THAT SOCIETY EXPECTS BUSINESSES TO TAKE A MORE ACTIVE ROLE IN ENVIRONMENTAL, SOCIAL AND POLITICAL ISSUES THAN IT DID FIVE YEARS AGO.

their human resources policies,” says Timothy Smith, senior vice president of Boston-based Walden Asset Management and chair of the board of the Social Investment Forum. “Today, 99 of the Fortune 100 companies have included this in their policies.”<sup>4</sup>

So where does this lead us? CECP leaders say a company’s contract with society is not an obligation but a source for competitive advantage and a powerful opportunity to attract and retain talent and ensure the health of their markets over the long term.<sup>5</sup> With this in mind, companies are now focused on the development of sophisticated, holistic approaches to their corporate philanthropy.

### A MOVE TOWARD STRATEGIC CORPORATE PHILANTHROPY

–84% of corporate executives believe that society expects businesses to take a more active role in environmental, social and political issues than it did five years ago. Corporate philanthropy is one effective way to meet these new expectations.<sup>6</sup>

How does the current economic climate impact corporate giving?

Historically, corporate philanthropy is most affected by Gross Domestic Product (GDP), profits and changes in top marginal tax brackets. According to Giving USA, corporate philanthropy in 2008, including both financial and in-kind donations, accounted for five percent of all charitable giving in the United States in 2008, about \$14.5 billion.

Though this figure is down from \$15 billion in 2007, corporate philanthropy has withstood what some are calling the “Great Recession” in relatively good condition, considering corporate profits were down 16 percent during the same period. One reason why corporate giving did not decline as much as corporate profits could be the rise in in-kind donations. 2008 saw a marked trend toward increased in-kind giving, suggesting many companies want to maintain their support for the nonprofit sector through more creative ways that may not involve cash.

Looking ahead, forecasts for 2010 indicate that 52 percent of corporations and 47 percent of corporate foundations are reporting declines in their giving budgets.<sup>7</sup>

Adding complexity and pressure to the corporate philanthropy landscape are consumers, many of whom have become savvier about the goods and services they purchase. They are asking, and in many cases requiring, more authenticity, commitment and transparency from companies regarding how their businesses impact people and the environment. Strategic corporate philanthropy can offer significant competitive advantages to companies trying to build relationships with consumers and be heard over the din of negative news.

By now, you might be asking what’s the good news here?

In the past, much of corporate philanthropy was done without realizing the strategic value it provided. Recent re-evaluations from corporate givers provide a powerful impetus to leverage change. The long-term outcomes will likely be more strategic and deliberate corporate philanthropy, improving outcomes for both the corporation and the community.

<sup>4</sup> Corporate Social Responsibility, Diversity, Inc. Nov/Dec 2007

<sup>5</sup> CECP Board of Boards CEO Conference Executive Report. CECP 2009

<sup>6</sup> Business’s Social Contract: Capturing the Corporate Philanthropy Opportunity. McKinsey & Co., CECP, 2008

<sup>7</sup> “Corporate Giving is Moving Into a New Age,” LBG Research Institute, 2009





## A NEW WAY OF DOING BUSINESS

When businesses think of corporate philanthropy as *social investing*, not charity, they become more alert to possible inefficiencies. Due diligence with potential nonprofit partnerships ensures that every dollar is spent wisely. Collaborating with other companies on philanthropic initiatives provides for even greater impact. Collectively, businesses can move the needle on important social issues far more than any individual company.

When companies adopt the approach of social investment to up-level their competitive context—using their charitable efforts to improve the quality of the business environments in the locations they operate—they align social and economic goals. They improve their long-term business prospects and direct their philanthropic activities to areas where they can be far more effective.

## NO TIME LIKE THE PRESENT

“Typically, in a bad market, companies spend less money on marketing,” says Philip Nourie, President of Park Lane Communications in New York City. “But in this instance, there is a great opportunity for companies to take a strategic approach to how they market their services and their track record. By cutting philanthropy in a time of greater community need, companies may miss an opportunity to communicate their messages and reinforce their brands.”<sup>10</sup>

Governments at the local, state and federal level have fewer dollars available to address the most pressing problems within communities. Companies have an opportunity to fill the void, make investments in their communities and leave lasting legacies. “The best corporate philanthropy is about passion,” says Nourie, “and consumers and the public are drawn to a company that has a passion for something.”

Nourie recommends a few tips for successfully protecting a company’s philanthropic investment:

●●●●●●●●●●  
Successful philanthropy is often a learning process, in any market. Patience, continuity of involvement and open communication are important criteria for success.  
●●●●●●●●●●

- **Don’t consider philanthropy solely a marketing expense.** Consider it an operations expense that reflects human resources and financial objectives as well.
- **Increase payout in down markets, even if pretax profits will be lower.** The impact of a company’s giving will be noticed more during difficult times.
- **Retool the philanthropic construct.** Is it financially based, a combination of goods and services or all three? Where is the greater need, hence opportunity, for a corporate presence and response to the needs of targeted constituencies?
- **Clarify expectations with nonprofit partners.** Ensure that there is agreement on the expected outcomes of contributions. Build an evaluation component into the giving strategy to measure the investment over a reasonable time period and determine whether the company’s philanthropic commitment was met with stated goals and objectives.
- **Be patient.** Successful philanthropy is often a learning process, in any market. Patience, continuity of involvement and open communication are important criteria for success. This is even truer in a troubled economy where trust and good intentions will need to be earned, not assumed.
- **Leverage opportunities.** With fewer dollars it may be advantageous to all parties to explore how to partner with other corporate entities or executives.

<sup>10</sup> Focus on: Is This the Time for Companies to Be Philanthropic?, Strategic Philanthropy, Ltd., October 2008

# Snapshots of Strategic Corporate Philanthropy

Getting it right is not easy, but a number of companies are embracing a new vision of corporate philanthropy with appropriate resources and strong leadership. They are working to achieve both social and business goals with their philanthropic programs—thus helping to shape a new sustainable social contract. One such example is the innovative corporate-nonprofit collaboration between PepsiCo and PFLAG, which is featured here. See Chapter 6 for additional examples of successful partnerships.



**It's about expanding workplace equality. Every person has value, and we need to ensure that everyone feels comfortable bringing their *whole* selves to work each day."**

—Claire Lyons  
Manager, Global Grant Portfolios  
PepsiCo Foundation

## PepsiCo and Parents, Families & Friends of Lesbians and Gays (PFLAG) Expanding Workplace Equality

### ORGANIZATIONS

**PEPSICO** is a multinational food and beverage corporation headquartered in Purchase, NY, whose brands include Quaker Oats, Frito-Lay and Tropicana, among others. At the core of PepsiCo is *Performance with Purpose*—achieving business and financial success while leaving a positive imprint on society. PepsiCo defines its business success by being—and by being recognized as—a leader in sustainability. PepsiCo launched *Performance with Purpose* in 2003.

**PARENTS, FAMILIES & FRIENDS OF LESBIANS AND GAYS (PFLAG)** is a national support, education and advocacy organization for the LGBT community and their families, friends and straight allies. Acting to create a society that is healthy and respectful of human diversity, PFLAG believes that change happens at the grassroots level in local communities. One of the organization's core programs, *Straight for Equality*, aims to equip straight allies with strategies that promote an open and inclusive workplace for the LGBT community.



### THE CHALLENGE

Building a distinct, clear, broad LGBT strategy owned by, and activated through, key functions of PepsiCo, including Human Resources / Diversity; the Employee Resource Groups—EQUAL; and Philanthropy / PepsiCo Foundation.

Though most companies have diversity and inclusion statutes written into their corporate bylaws, there are too often limitations on how strongly such policies are enforced. Being openly LGBT in the workplace is still a problem in many areas of the country. When employees feel uncomfortable at work, there can be adverse affects on health and job satisfaction, and job performance is often diminished as well.

Recognizing the value of diversity and inclusiveness in the workplace, PepsiCo's *Performance with Purpose* includes Diversity & Inclusion as an important component of the platform, with emphasis on fostering an open and safe space for all employees. (Each year since 2004, PepsiCo has achieved a perfect 100% score on Human Rights Campaign's Corporate Equality Index.) To ensure this corporate value extended to its LGBT employees, PepsiCo's employee resource group (ERG) EQUAL partnered with an organization that could provide a framework and training with actionable steps to advance LGBT inclusiveness as a mainstay of an equal workplace environment and culture.

### THE APPROACH

PepsiCo and PFLAG came together after more than a year of partner and solution searching, spearheaded by PepsiCo's Foundation, human resources division and employee resource group EQUAL. The corporate team held a series of roundtable meetings with preeminent LGBT groups. At the heart of these in-depth dialogues was the charge to identify the critical horizon issues in the LGBT space related to American workplaces and come up with practical programs and resources to address these challenges. The horizon issue for PepsiCo was how to define equal culture in business, particularly the nuances and intangible elements of corporate culture.

Out of this shared exploration, the PepsiCo Foundation developed a theory of change framework for workplace equality investment. The LGBT Horizon Plan emerged after 16 months of investigation, collaboration, learning and due diligence. A four-stage strategic plan was laid out, which hinged on gaining alignment and go-ahead from the board of directors of the PepsiCo Foundation for workplace equality as a plank within its diversity and inclusion funding priority. The green light was given. Philanthropic LGBT investment then became a component of PepsiCo's overall presence and commitment as a responsible global corporation and citizen.

### PEPSICO FOUNDATION STRATEGIES

1. Use philanthropy as a strategic tool to strengthen, integrate and catalyze
2. Fund issue-areas that otherwise aren't funded that will drive significant advancement for all
3. Maximize investments with alliances, collaboration and engagement
4. Look at the long haul to drive sustained benefits and success

The LGBT mission for the Foundation then was fundamentally to collaborate and fund organizations to design resources, toolkits and engagement programs that would enable companies in the United States—large, medium and small in size—to advance equality in their workplaces by focusing specifically on Culture, Climate, Policy and Compliance.

At the heart of these in-depth dialogues was the charge to identify the critical horizon issues in the LGBT space related to American workplaces and come up with practical programs and resources to address these challenges.

Activating the mission meant giving companies the tools they needed to measure and evaluate their workplace climates and then to navigate through adjustments and changes in their corporate cultures and work environments.

Human Rights Campaign received the first Foundation grant for the LGBT Workplace Climate to create:

—*The LGBT Inclusion Toolkit for Corporate America...Workplace Equality—  
creating safe and affirming environments for LGBT employees and their  
colleagues*

...the aim being to develop people and remove obstacles to productivity. A place where everyone is valued and cherished is a productive workplace.

Simultaneously, the PepsiCo Foundation paired PFLAG National with its employee resource group EQUAL across its three headquarter locations to anchor its second grant program: PFLAG's *Straight for Equality*.

With more than 350 chapters and affiliates across the United States, PFLAG stood out because of its ability to engage a large network of individuals on the local level. "They had a proven track record of effectively mobilizing their network. They know how to engage society one-by-one to vote, to pledge support and to take a stand for equality," says Lyons. "They are also experts at empowering straight allies to stand up for LGBT equality. Allies are crucial and a pillar in the Foundation's workplace equality strategy."

The PepsiCo Foundation provided PFLAG with seed funding to develop a pilot concept of *Straight for Equality* and the following year funded a two-year grant for the creation and rollout of the full *Straight for Equality* program with an emphasis on their workplace training program as well as the development of additional ally-building modules.

Leveraging more than 35 years of experience transforming opinions and attitudes of the LGBT community, PFLAG's *Straight for Equality* program provides training seminars, publications as well as online tools and resources that educate straight peers on the importance of being allies at work and in their communities. A key component of the program encourages straight colleagues to sign a pledge to speak openly about their status as a straight ally and proactively speak out against anti-LGBT attitudes and comments in the workplace.

PepsiCo immediately recognized *Straight for Equality* as a building block and lever to secure LGBT equality in businesses nationwide. Working with staff from PFLAG National, PepsiCo developed a partnership whereby the company would offer a multi-year grant for PFLAG to expand its workplace outreach. The grant served to further development, design and implementation of *Straight for Equality* by providing a more solid programmatic infrastructure, a detailed website equipped with user-friendly tools and resources, and grassroots support and local resources that could be activated and accessed through the 350-plus PFLAG chapters nationwide. PepsiCo fully believed in *Straight for Equality* and recognized that its value lies in its ability to bring a new perspective to LGBT diversity training in the workforce that focuses on climate change rather than policy change and provides targeted training as well as a connection for businesses to community-based resources through PFLAG's membership network.

## THE RESULTS

PepsiCo's support provided PFLAG National with the much-needed funding to build *Straight for Equality*. However, PepsiCo's contribution did not end there. By promoting *Straight for Equality* and its workplace training programs throughout its own company, PepsiCo was able to generate interest in the learning program and bring *Straight for Equality* training to work sites nationwide. While many training sessions took place in more corporate environments in the company, PepsiCo also brought *Straight for Equality* to line workers and staff who generally have less access to diversity trainings. Notably, Frito Lay (a PepsiCo division) in San Antonio, TX, brought PFLAG staff in to train its entire plant. Other smaller sites leveraged the online training services to bring *Straight for Equality* to its staff, who might otherwise not have access to the training.

Behind the scenes, PFLAG and PepsiCo worked together to develop strategies to ensure successful implementation of the program within the company. Beginning at the PepsiCo headquarters in New York, PFLAG representatives provided thought leadership training to senior executives, covering topics including workplace sensitivity and crisis management. (PepsiCo has been the target of numerous boycotts regarding their LGBT-inclusive values.)

Outside of PepsiCo, PFLAG has been able to dramatically expand its *Straight for Equality* outreach in workplaces across the country. By the end of 2009, *Straight for Equality* will have been offered in more than 35 major U.S. corporations, with the vast majority of these trainings featuring local PFLAG chapter members working with National staff, ensuring lasting community connections for companies long after the training has ended. More than 3,500 people have been touched by these trainings and demand continues to be strong.

Additionally, PepsiCo's support has enabled PFLAG to distribute more than 40,000 copies of its first *Straight for Equality* publication: *The Guide to Being a Straight Ally*. The *Straight for Equality* team also used a portion of its PepsiCo funding to support the development and publication of a second book, *Straight for Equality in Healthcare*, which will have a companion training program available in 2010. Finally, research and development for the next *Straight for Equality* module, which will focus on faith communities, is in the works.

The partnership between PepsiCo and PFLAG continues to grow, with PepsiCo employees marching alongside PFLAG in parades; a senior PepsiCo executive has also joined PFLAG's Board of Directors.

PepsiCo immediately recognized *Straight for Equality* as a building block & lever to build and secure LGBT equality in businesses nationwide.

# TIP

**TIP FOR CORPORATE ERGS—**Your voice is important. Employees' ideas can help strengthen the design of a company's giving program. Decide on two or three organizations you think would be an ideal match for your company, draw up a proposal that aligns their missions with your company's values and goals, and present it to your Philanthropy Officer.



**THE PURPOSE OF THE SURVEY**

**WAS TO BETTER UNDERSTAND THE CHALLENGES  
THAT NONPROFIT ORGANIZATIONS FACE WHEN  
TRYING TO RAISE MONEY OR AWARENESS, BUILD  
STRATEGIC PARTNERSHIPS, OR DEVELOP THEIR  
OWN CAPACITIES TO RESEARCH AND  
UNDERSTAND THIS COMPLEX AND  
EVOLVING PHILANTHROPIC LANDSCAPE.**

“ I think the science and practice of community-corporate partnerships deserves more study and attention in hopes of truly capitalizing on the unique skills and expertise these sectors have to offer one another and our communities.

—Nonprofit respondent to the 2009 Business of Change Survey



# Surveying the Field

## Business of Change Survey Results

The *2009 Business of Change Survey* asked nonprofit and corporate professionals working toward advancing LGBT equality and other social issues for their best ideas and advice to foster relationships between corporations and nonprofits. Questions in the survey were developed to understand better the challenges that nonprofit organizations face when trying to raise money or awareness, build strategic partnerships, or develop their own capacities to navigate the complex corporate philanthropy landscape.

The *2009 Business of Change Survey* was conducted as two separate, but inter-related questionnaires, one designed for people working in nonprofits and one designed for employees of corporations. Thus, *Chapter 2: Surveying the Field* is divided into two sections: *The Nonprofit Survey Results and Analysis* and *The Corporate Survey Results and Analysis*. Each section outlines the survey methodology and gives top-line analysis for some of our findings. In particular, we've included a series of sections called "Behind the Numbers" to share insights and observations on key survey findings.



SECTION 1:

# Nonprofit Survey Results & Analysis

COMMENTARY

Survey respondents underscored significant opportunities to strengthen corporate-nonprofit collaboration with their comments:



*“Thanks for doing this survey. I hope the information that you collect helps LGBT organizations grow.”*

*“Thank you for taking an interest in gathering this information. I look forward to seeing the results. We are open to any creative partnerships, collaborations, and trainings that might come as a result of your survey.”*

*“Today we're actively about the business of building business relationships.”*

*“There is a lack of understanding how smaller organizations have had a substantial impact, sometimes greater than the large budgeted organizations.”*

*“Corporate support is important and contingent on understanding the corporate return on investment need with the recipient organizations core programs. The ability of a development professional to act as the “translator” between the organizations is critical and absolutely important to successful fund raising from corporations.”*

*“It has been our experience that corporations prefer to support charities in cities where they operate and their employees live and volunteer.”*

*“[We] first developed our business program as a mission-essential and revenue generating program in 2004. New information to help us advance this further would be great.”*

*“We have found it difficult to engage corporations in our work, and are interested in exploring strategies to deepen our relationships in this area.”*

*“We are always looking at ways to work with law firms and corporations to defray costs for printing, press, space needs, etc.”*

*“Increased corporate support represents a big opportunity for us. It is one area of fundraising and project support that we have not developed. We could benefit from all forms of support from corporate giving, to board involvement, to pro bono legal services, and more. We would be interested in any and all guidance in this area.”*

*“Interested in learning more about ethics of corporate partnership, how to develop a gift acceptance policy in line with organizational values.”*

*“This survey is a good idea. I think there's great potential in making connections with corporations. We all have a lot more work to do.”*

.....  
“The ability of a development professional to act as the ‘translator’ between the organizations is critical and absolutely important to successful fund raising from corporations.”  
.....

## METHODOLOGY

The Gill Foundation and Weber Shandwick conducted the *2009 Business of Change Survey—Nonprofit Version* online between July 14, 2009 and August 3, 2009. We surveyed 247 nonprofit professionals who work in a variety of capacities at their respective organizations. Survey participants represented a broad cross-section of LGBT organizations around the country doing work at the national, state, and local levels. The organizations ranged in both staff and budget size. Respondents were recruited through professional and personal (or social) networks.

## THE NONPROFIT PROFESSIONALS WE TALKED TO

### 1. What is your role in your nonprofit organization? (Select all that apply.)

45% Executive directors and/or CEOs

45% Development

13% Communications

10% Administrative and/or finance

8% Programmatic operations

14% Other, including co-founder, deputy director, public policy/governmental affairs

45%

OF NONPROFIT  
RESPONDENTS ARE  
EXECUTIVE DIRECTORS  
AND/OR CEOs OF THEIR  
ORGANIZATION

### 2. How long have you worked at your organization?

44% Less than 3 years

21% 3-5 years

23% 5-10 years

12% More than 10 years

#### Behind the Numbers:

**NEEDING TO NETWORK** It is important to acknowledge that of those surveyed, 65 percent have worked at their nonprofit for less than five years. Strategic, long-term and genuine partnerships between nonprofits and corporations require at least one crucial ingredient—*time*. Networking to share information and background about a corporate-nonprofit relationship will help ensure the partnership is sustained over the long-term.



41%

OF NONPROFIT  
RESPONDENTS DO WORK  
ON A NATIONAL LEVEL

### 3. What sector of the LGBT nonprofit community do you serve?

31%	Advocacy
25%	Community center
9%	Legal
6%	Healthcare and/or social service
4%	Capacity building and/or research
3%	Arts, media and/or communications
18%	Other, including education, family, religion
4%	Did not answer / Did not know

#### Behind the Numbers:

**A LESSON IN LANGUAGE** Because the highest percentage of respondents report working in the Advocacy sector, and because there is a wide range of advocacy work, it is important that nonprofits translate the kind of advocacy they do into the appropriate corporate language. Nonprofits should review giving guidelines, as well as the mission, vision and objectives of any potential partner’s corporate philanthropy work before pursuing a relationship.

Additionally, a recent survey from GFK/Roper noted that most consumers want corporate social responsibility (CSR) initiatives (including sustainability) to focus on local needs.<sup>7</sup> This bodes well for the 25 percent of respondents who said they work at community centers.

### 4. What is the broadest scope of your organization?

41%	National
30%	State
19%	Local
10%	International

<sup>7</sup> GFK Roper Reports “Green and the Recession: It’s Different This Time” 7/30/09



### 5. What is your annual budget for 2009?

43%	Less than \$500,000
11%	\$500,000-\$1 million
20%	\$1-\$3 million
11%	\$3-\$5 million
5%	\$5-\$10 million
9%	\$10 million or more
1%	Did not answer / Did not know

#### Behind the Numbers:

**BEING CASH CONSCIOUS** The most notable take away from this question is that nearly half (43 percent) of organizations surveyed are operating on an annual budget of less than \$500,000. Altogether, more than half (54 percent) are operating on less than \$1 million a year. This closely ties into Question 13 of the Nonprofit Version of the survey where 73 percent of nonprofit respondents identify event sponsorship or program grants as the top two corporate resources that have the greatest potential to help their organizations.

Conversely, in Question 10 of the Corporate Version of the survey only 38 percent of corporate respondents feel that cash grants have the greatest potential to address social issues, and 56 percent suggest that pro bono services and employee volunteerism are better options.

Small (and in some cases getting smaller) budgets can handicap nonprofits and heighten the need for cash resources. However, this survey and other sources indicate corporations increasingly want to move away from purely monetary support. This highlights the need for more thinking about developing strategic partnerships that leverage assets other than cash.

### 6. What is the total number of people on your staff?

43%	Less than 10
25%	10-24
8%	25-49
3%	50-74
5%	75-99
7%	More than 100
9%	Did not answer / Did not know

#### Behind the Numbers:

**LACKING HUMAN RESOURCES** Forty-three percent of respondents that operate on less than \$500,000 a year also work for an organization with fewer than 10 people on staff. This is significant, as those with the lowest budgets also have the least human power. In total, 68 percent of respondents work on a staff with fewer than 25 people.

Just as the business community has expectations that nonprofits understand the corporate philanthropy landscape, nonprofits need the business community to understand nonprofit culture and context. Many nonprofits lack the financial and human resources of some of the bigger, national, and better-known LGBT nonprofits to build and maintain strategic and sustainable partnerships.

# 43%

OF NONPROFIT  
RESPONDENTS HAVE  
LESS THAN 10 PEOPLE  
ON THEIR STAFF



### 7. What is your fiscal year?

53% Calendar year

35% June-July

12% Other, citing mostly an October-September or November-October fiscal year

### HOW NONPROFITS RAISE MONEY AND RESOURCES

### 8. How many staff people are focused exclusively on fundraising?

23% 0

21% 1

13% 2

32% 3 or more

11% Did not answer / Did not know

# 23%

OF NONPROFIT RESPONDENTS HAVE NO ONE ON STAFF WHO EXCLUSIVELY WORKS ON FUNDRAISING

#### Behind the Numbers:

**DOING MORE WITH LESS** Nearly half (44 percent) of nonprofit respondents have fewer than two people on staff whose sole purpose it is to raise money for the organization, with almost a quarter (23 percent) having no one. This stresses the need for human capital at many LGBT nonprofits, since cash is needed to keep doors open and time is needed to develop more strategic relationships and creative partnerships with corporations.

### 9. Is there a staff person who is dedicated to working with the corporate community?

57% No

43% Yes

Of the 43 percent of respondents whose organizations do have a staff member dedicated to working with the corporate community:

78% Say that this staff member spends 50 percent or less of their time on this

6% Have staff member who spends 100 percent of the time working with the corporate community

#### Behind the Numbers:

**FINDING AND FOLLOWING GIVING GUIDELINES** Corporations can facilitate the partnership building process with nonprofits by clearly explaining—and having readily available on company websites—their philanthropic objectives, giving guidelines and application processes. The more transparent corporations are, the less time that will be wasted by both nonprofits and corporations writing, or reviewing, proposals that have no chance of getting funded.

## 10. How many people are on your board?

39% Less than 10

40% 11-20

10% 21-30

11% More than 30

## 11. What percentage of your board are corporate professionals?

85% Have boards where corporate professionals occupy 50 percent or less of the seats

15% Have zero corporate professionals on their boards

### Behind the Numbers:

**BUILDING BOARD CONNECTIONS** Having a nonprofit board member come from the business community can be an effective way to leverage a company's cash or in-kind resources. But beyond funding, a corporate board member can help the nonprofit by sharing knowledge of the inner workings, language and culture of the business community; developing proposals directed at building corporate partnerships; or making introductions to others in the business community.

## 12. Which form(s) of corporate resources have you received? (Select all that apply.)

85% Event sponsorships

73% Matching employee contributions

69% Product donations (including venue or office space)

68% Pro bono services

58% Workplace giving contributions

56% Program grants

53% In-kind underwriting

52% Employee volunteering

22% Leveraging of other corporate assets

4% None

10% Other, including board participation, licensing fees, co-branded cause marketing product sales

### Behind the Numbers:

**UNDERUTILIZING STRATEGIC ASSETS** Many nonprofits rely on the traditional sponsorship approach, such as event or table sponsorships, when trying to access corporate funds. However, the Corporate Version of the survey suggests corporations are now more interested in strategic engagement that leverages other resources (e.g., pro bono services, product donations, partnership, employee engagement, etc.). Nonprofits and corporations can form more strategic, creative and sustainable relationships by building partnerships that share, leverage and amplify resources on both sides.

# 85%

OF NONPROFIT  
RESPONDENTS  
HAVE RECEIVED EVENT  
SPONSORSHIPS FROM  
CORPORATE RESOURCES



## THE CORPORATE SUPPORT NONPROFITS WANT

13. Which corporate resource do you feel has the greatest potential to help your organization?

41%	Program grants
32%	Event sponsorships
6%	Matching employee contributions
6%	Workplace giving contributions
4%	In-kind underwriting
4%	Pro bono services
2%	Leveraging other corporate assets
1%	Employee volunteering
1%	Product donations (including venue and office space)
4%	Other, including unrestricted cash contributions, all of the above.

### Behind the Numbers:

**THE CREATIVE CHASM** Nonprofits overwhelmingly see program grants and event sponsorships (73 percent combined) as having the greatest potential to help their organizations. However, as noted in many parts of this guide, many companies want to move beyond simple cash grants, unrestricted giving and event sponsorships.

For example, when asked the same question, more than a quarter (27 percent) of corporate survey respondents said that employee volunteering has the greatest potential to help address social issues. Yet only one percent of the nonprofit respondents agree. (Question 10 Nonprofit Version).

Strategic, long-term, mutually beneficial partnerships between nonprofits and corporations are built by and between people. While cash grants are obviously important, this seems to only speak to the more immediate needs of nonprofits. Engaging corporate employees as in-kind assets or volunteers is a way for nonprofit staff to gain access to, begin constructive partnerships with, and connect with an internal advocate at a company.

# 1%

OF THE NONPROFIT RESPONDENTS FEEL THAT EMPLOYEE VOLUNTEERING HAS THE GREATEST POTENTIAL TO HELP ADDRESS SOCIAL ISSUES AS COMPARED TO 27 PERCENT OF CORPORATE RESPONDENTS

14. To help forge strategic relationships with companies, what information would be most helpful to you? (Select all that apply.)

85% How do I gain access?

65% What are the most effective ways to begin constructive partnerships?

62% How do I connect with an internal advocate/champion?

54% Who controls the money?

45% What is the decision making cycle?

45% Tips for negotiating with corporations

39% What non-monetary resources are available?

34% Resources for learning how to create a business case

21% How do I research the company's history, mission and values?

**Behind the Numbers:**

**KNOWING WHERE TO BEGIN** Corporate structures can be complicated and difficult to navigate—even for its employees. Amplifying this need is that 37 percent of corporate respondents said that their company websites do not feature corporate giving guidelines for nonprofits. (Question 12, Corporate Version) Since 85 percent and 65 percent of nonprofit respondents want to know how to gain access or how to begin building partnerships, respectively—some suggestions are needed to map out the first steps.

See *Chapter 3: A Guiding Glossary: Terms from the Landscape* for ideas about how to understand and navigate the landscape.

15. Have you ever had to decline funding from a corporation?

81% No

19% Yes

**Behind the Numbers:**

**KNOWING THE VALUE OF “NO”** Saying *no* is an important option that both nonprofits and corporations need to consider when discussing a potential partnership. For this question, reasons given for declining funding include companies whose policies are not LGBT inclusive or companies whose policies are simply not in line with the organization's mission.

In approaching corporations, nonprofits should research giving guidelines; understand local, state and federal government requirements and restrictions around receiving grants; and outline how the relationships they are proposing align with the missions of both the corporation and their own organizations. Without alignment, it is probably best to say no and move on.

**VERBATIM**

*“I have not heard of us turning down a gift.”*

*“The giving program was not compatible with the core values of the organization.”*

*“The mission of our organization made the potential partnership appear like we might be ‘endorsing’ the product / service we were being asked to promote.”*

*“Declined funding from the corporate community based on giving or positions taken by an entity that supported anti-LGBT initiatives.”*

*“A business wanted to pay us for ‘referrals’ suggested that he become a sponsor of the organization instead.”*

19%

OF NONPROFIT RESPONDENTS HAVE HAD TO DECLINE FUNDING FROM A CORPORATION



54%

OF THE NONPROFIT RESPONDENTS SAY THAT LESS THAN 10% OF THEIR TOTAL REVENUE COMES FROM CORPORATE FOUNDATION GRANTS

## THE CORPORATE PARTNERSHIPS NONPROFITS HAVE BUILT

---

16. What percent of your total revenue comes from corporate support, such as event sponsorships or corporate foundation grants?

54% Less than 10%

---

28% 10-20%

---

10% 20-30%

---

5% 30-50 %

---

3% More than 50%

### Behind the Numbers:

**STRATEGIC USE OF TIME** Nonprofits should be strategic with how much time and energy they put into building relationships with corporations, which often provide a relatively small amount of their overall revenue. This is not unique to just LGBT organizations, as Giving USA 2009 reports that corporate giving accounts for only five percent of all charitable giving.

17. What types of members of the corporate community has your organization built relationships with? (Select all that apply.)

65% Corporate giving and/or foundation executives

---

59% Human resources and/or diversity officers

---

57% Marketing

---

51% Employee resource group (ERG) leaders

---

43% Board members

---

38% CEOs, presidents, corporate partners and/or principles

---

38% Local affiliates

---

12% Unions

---

8% Other, including none, recruiters, LGBT employee

### Behind the Numbers:

**MULTIPLE POINTS OF ENTRY** There are multiple points of entry to a company to build relationships and unlock potential resources. ERGs are one of the most effective with almost one-third (29 percent) of corporate respondents saying their ERG has the ability to allocate resources. (Question 15, Corporate Version) Yet, only half (51 percent) of nonprofit respondents said they had developed a relationship with ERG leaders.

Beyond resources, ERGs can provide insight into the culture of the company, and guide the nonprofit through a grant application or partnership development process.

18. Please describe one key partnership that best represents your organization's engagement with a corporation. Please include:

A. Program name and brief description

B. Partner corporation

C. Approximate cash and non-cash amount contributed to the program

D. Description of the impact the program hopes to make and how it will be measured

### Partnership

*"We have a growing partnership with [a national insurance company] that includes event sponsorship, program underwriting, communications sponsorship and a multi-event entree to their employees regionally. The regional office also makes efforts to provide access to their agents throughout the region. This program is small to date—total revenue to date has been only about \$2500. But the potential is quite large, not just with [the insurance company], but as a template for other corporations."*

*"For nearly 15 years we have had key partnerships with [a national bank] and [a national association]. Our partnerships with them entail mutually agreed upon goals that support one another's mission and interests. The partnerships include cash support for our programs, donations of products and services, organizing joint community and business events and seminars. We also receive substantial matching employer contributions. From each partnership, we receive over \$50,000 in cash, approximately \$10,000 in matching contributions, and another \$10,000 plus in non-cash. The impact for these partnerships include: increased visibility, broader leverage, enhanced credibility, extended access, enhanced brand recognition, improved financial resources—cash and customers, and a further opportunity to make a difference."*

A camp experience for LGBT and ally college students has a core curriculum of skills building in leadership development, social justice and civic involvement and had five corporations with a value of \$10,000 and a total of six employee volunteers/48 hours on-site. Building leadership in college and on into the workplace depends on a successful transition and match in talents and resources. The corporate partner program allows businesses to create an "indelible relationship" at camp. In addition to sponsorship, each partner must also donate a minimum of one employee to be a corporate partner at camp for two days (48 hours approx). Partners participate and, or observe all camp activities and plan a corporate component to camp.

*"[An apparel company] has been one of our greatest partners. We are engaged with their employee giving portal; we receive grants; we have received products and they sponsor many of our events. We provide them with a high level of visibility within the LGBTQ community, which ensures that their product and brand remains elevated, popular and supported amongst constituents who tend to have disposable income. [The apparel company] has sponsored our largest fund raising event and they also sponsored the grand opening of our new building. It is an essential partnership that benefits both [our nonprofit and the company] for financial and PR purposes."*

.....

"For nearly 15 years we have had key partnerships with [a national bank] and [a national association]. Our partnerships with them entail mutually agreed upon goals that support one another's mission and interests."

.....



.....

“A leading, national bank has supported our agency for nearly a decade with an annual gift of \$50,000. Funds have been used to underwrite economic development programs, as well as general operating needs.”

.....

A national retailer provided \$75,000 cash plus net proceeds of sales over a 4-week period in 40 stores with co-branded t-shirts manufactured by another major brand. Additional non-cash contribution included placement of volunteer organizational representatives in 40 locations for 4 hours collecting contacts in exchange for additional shopping discount. Measurable objectives included: 1) Using program as first initiative in potential longer-term partnership; 2) Organizational publicity through media events, promotion (the retail store mailed materials to over 1 million consumers; 3) contact acquisition and organizational promotion via in-store organizational representatives; 4) Fundraising thanks to \$75,000 commitment plus the net proceeds of sales of individual product.

.....

A major bank provides about \$100,000 per year in a partnership that includes local level event sponsorships, life planning seminar underwriting (which includes a speaking/teaching role for financial planners), and in-kind underwriting of major donor receptions in selected cities throughout the country.

.....

*“A leading, national bank has supported our agency for nearly a decade with an annual gift of \$50,000. Funds have been used to underwrite economic development programs, as well as general operating needs. A representative of their organization has often sat on our board, although currently that is not the case. Funds have been channeled through both the bank’s community affairs program as well as the foundation. While these are two separate departments with different funding priorities, we find that they work closely to support the business development needs of the bank. In response to recent changes in the economic climate, they have shifted funding away from event sponsorship and more to direct program and operating grants. While renewed funding in the past was fairly routine, that has changed in recent years, requiring almost 1/2-year of negotiation to secure our most recent grant. Strong public acknowledgment is very important to them, but they require little to no final reporting.”*



.....

*“We partnered with [a financial services company] on 4 reports looking at: (1) the impact of unequal treatment of same-sex partners in employer retirement plans and the costs of equal treatment; (2) same-sex couples’ preferences for marriage versus civil unions or domestic partnerships; (3) taxation of domestic partner healthcare benefits; and (4) estate tax disadvantages for same-sex couples. [The financial services company] contributed approximately \$62,000 to the work, and intends to incorporate findings into brochures, website content, and other internal/external communications. Completion of the studies was timed to support pending legislative proposals on these issues. Measurement of the project’s success is based on: (1) number of consultations with advocates, policy makers, and others on work; (2) number of press hits; and (3) dissemination of study to various stakeholders.”*

.....

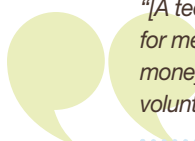
A financial services company supported a financial literacy campaign. The goal was to help LGBT youth, adults and elders to address financial issues, including financial security, job skills and retention, credit card debt reduction, identity theft, and financial and estate planning. The impact is to help participants develop a financial plan (done through face-to-face interactions with financial planner) that will assist participants to save money and to spend/invest wisely, and to adhere to the plan, revising as necessary with planner. Measurement will be through follow-up sessions every six months for two years.





## Program Grants

---



*“[A technology company] provides \$50K program grant for Elder Service, in-services for medical staff. All programs are measured through benchmarks. This is valuable seed money for a new program that supports outreach workers. Also provides group volunteers for special projects in resale stores and is a new relationship.”*

---

A LGBT health education program is funded by a national pharmaceutical company for \$100,000 and targets healthcare professionals on topics and issues affecting the health and wellness of the LGBT community.

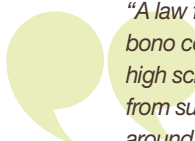
---

*“We have had some success in raising corporate support from [a medical company] to support our efforts to protect state funding for an AIDS drug assistance program. They have sponsored us at \$7,500 a year for two years in a row to incorporate this issue in our lobbyist contract, conduct some policy analysis and message development and provide advocacy support to our local AIDS service providers in training their consumers on effective legislative communication.”*

---

## Pro Bono Services

---



*“A law firm provided \$285,000 in pro bono counsel services. The law firm provided pro bono counsel in a case to fight blatant student censorship of pro-LGBT messages at a high school. We went to trial and won the case; the school was permanently enjoined from suppressing students' First Amendment rights. We garnered a great deal of press around the case and the decision. The case has great impact because it reminds other schools in Florida and throughout the country that it is illegal to violate the First Amendment rights of their students and they open themselves up to litigation when they do so.”*

---

## In Development

---

We have just begun to develop relationships with a few corporations in the context of our training conference; to date, we have received only merchandise as in-kind donations, which does not impact any program in a measurable or substantive way. We hope these first in-roads will lead to later more substantial and more beneficial contributions.

SECTION 2:

# Corporate Survey Results & Analysis

## METHODOLOGY

The Gill Foundation and Weber Shandwick conducted the 2009 *Business of Change Survey—Corporate Version* online between July 7, 2009 and August 3, 2009. We surveyed 279 employees of both Fortune 500 companies and smaller institutions from a variety of industries, including consumer products and retail; communications, marketing and advertising; financial services, media and entertainment; and business consulting. Participants work in a variety of capacities at their respective companies, and were recruited through professional and personal (or social) networks.

## THE CORPORATE PROFESSIONALS WE TALKED TO

1. In what department(s) or discipline(s) do you work at your present company? (Select all that apply.)

21% Employee resource group (ERG) leader

16% Marketing

10% Corporate giving and/or foundation

8% Corporate social responsibility

5% Public affairs

3% Government relations

37% Other

2. How long have you worked at your company?

33% Less than 3 years

19% 3-5 years

31% 5-10 years

17% More than 10 years

### Behind the Numbers:

**NEED TO NETWORK** It is important to acknowledge that of those surveyed, 33 percent of corporate respondents say they have been at their companies fewer than three years. Strategic, long-term and genuine partnerships between nonprofits and corporations require at least one crucial ingredient—*time*. Networking to share information and background about a corporate-nonprofit relationship will help ensure the partnership is sustained over the long-term.



# 33%

OF CORPORATE  
RESPONDENTS HAVE BEEN  
AT THEIR COMPANIES  
FEWER THAN THREE YEARS



28%

THE MAJORITY OF CORPORATE RESPONDENTS WORK IN CONSUMER PRODUCTS AND RETAIL

### 3. What industry are you in?

28%	Consumer products and retail
13%	Public relations and communications
11%	Media and entertainment
8%	Financial services
8%	Information technology
3%	Healthcare
1%	Hospitality and travel
1%	Telecommunications
0%	None
27%	Other

### 4. How many full-time employees does your company have in the United States?

15%	Less than 1,000
15%	1,000-5,000
5%	5,000-10,000
5%	10,000-20,000
12%	20,000-50,000
13%	30,000-50,000
17%	50,000-100,000
13%	More than 100,000
5%	Unsure

## HOW CORPORATIONS DISTRIBUTE MONEY AND RESOURCES

5. In what kinds of philanthropy does your company engage?  
(Select all that apply.)

80%	Employee volunteering and/or pro bono
65%	Cash donations
62%	Product and/or in-kind donations
58%	Matching employee contributions
43%	Leveraging other corporate assets
17%	Unsure
0%	None
8%	Other

80%

OF CORPORATE  
RESPONDENTS'  
COMPANIES ENGAGE IN  
VOLUNTEERING AND/OR  
PRO BONO

### Behind the Numbers:

**INVESTING MORE THAN CASH** Most corporate respondents said they offer employee volunteering and pro bono services (80 percent), followed by cash (65 percent), product and/or in-kind donations (62 percent), and matching employee contributions (58 percent), respectively. These results highlight the fact that corporate philanthropy programs use much more than cash, and see human resources, product and other non-cash resources as important elements to their nonprofit relationships. Go to [taprootfoundation.org](https://taprootfoundation.org) for research and pro bono strategy management services.

6. Which constituencies does your corporate philanthropy program best serve? (Select up to three.)

82%	Communities
68%	Employees
46%	Consumers
12%	Media and opinion leaders
7%	Government/regulators
5%	Shareholders or investors
5%	Board members
7%	N/A

60%

OF CORPORATE RESPONDENTS INDICATE THAT THEIR COMPANY'S PHILANTHROPY IMPROVES EMPLOYEE RECRUITMENT/RETENTION

7. Which of the following factors, if any, have the most weight in determining the focus of your corporate philanthropic program? (Select all that apply.)

- 60% Improve employee recruitment/retention
- 46% Differentiate from competitors
- 38% Build employee leadership capabilities
- 8% Manage risk
- 8% None of the above
- 22% Other

**Behind the Numbers:**

**UNDERSTAND AND ENGAGE COMPANY TALENT** Given that the weightiest factor for determining corporate philanthropic programs is improving employee recruitment and retention, nonprofits should always consider—and address—how their particular programs, partnerships or proposals engages a company's employees.

According to the most recent CECP survey, CEOs consider employees to be the most important factor in determining giving strategy, which can be tied to a company's recruitment and retention strategy, followed by customers. Employees at all levels of a company therefore have the ability to influence the allocation of corporate resources.<sup>1</sup>

8. In what areas of corporate philanthropy is your CEO actively involved? (Select all that apply.)

- 56% Serves as public face
- 44% Sets overall direction
- 33% Facilitates and makes sure resources are in place
- 29% Delivers internal communications
- 18% Makes funding decisions
- 11% CEO is not involved
- 5% Acts as a role model
- 16% Other

9. Does your company have any of the following programs for engaging employees in your philanthropy? (Select all that apply.)

- 54% Company-wide day of volunteer service
- 54% Flexible scheduling
- 48% Employee volunteer recognition awards
- 32% Pro bono services
- 26% Paid time off
- 20% Team grants
- 20% Board leadership programs
- 18% Dollars for doers grant programs
- 2% Other

<sup>1</sup> CECP Board of Boards CEO Conference Executive Report. CECP 2009.

## 10. How important should the economy be in determining cash contributions?

- 15% Very important
- 38% Important
- 42% Somewhat important
- 5% Not important

### Behind the Numbers:

**LOOK AT ECONOMIC INDICATORS** Ninety-five percent of corporate respondents said that the state of the economy is at least somewhat important in determining cash contributions, with 53 percent saying it is important or very important. Nonprofits must recognize the fact that most companies will restrict or reduce cash contributions in times of economic stress, so watching economic indicators (e.g., unemployment rate, stock market performance, consumer confidence, etc.) may portend a tough philanthropic landscape ahead.

Consider how a company's fiscal calendar may impact both its current and future philanthropy during an economic crisis. First, the company may need to reduce budgets in the short-term to more immediately manage expenses, overhead or other costs. Second, the company may also propose next year's budgets with a more conservative outlook. Thus, there may be a lagging effect for nonprofits for a full 12 months after an economic crisis. Nonprofits will need to continue to consider more creative—and less cash-focused—solutions when wanting to work with companies in tough economic times.

95%

OF CORPORATE RESPONDENTS SAY THAT THE STATE OF THE ECONOMY SHOULD BE AT LEAST SOMEWHAT IMPORTANT IN DETERMINING CASH CONTRIBUTIONS

## 11. When your company is considering a change in their contributions, which constituency most influences this decision?

- 49% Stakeholders and/or board
- 25% Customers and/or clients
- 22% Employees
- 4% Government and/or community leaders
- 0% Supply chain

### Behind the Numbers:

**MAPPING COMPANY STAKEHOLDERS** A company has many stakeholders that are impacted by—or invested in—the success of its business. From executives and employees, to customers and consumers, to community partners and beyond—stakeholders can offer some direction as to the issues and opportunities a potential nonprofit partner might pursue.

12. Does your corporate website feature giving guidelines for nonprofits? If not, how can nonprofits access this information?

63% Yes

37% No

*Behind the Numbers:*

**DOING YOUR HOMEWORK** More than one-third of corporate respondents admit they do not have giving guidelines published online. However, clear funding guidelines help nonprofits make better decisions about which corporate partners offer the best possibility for funding or partnership. Nonprofits need to dig for information about a company's giving guidelines or strategies, as they will more likely partner and collaborate with nonprofits if the mission, objectives and measurement criteria are clearly aligned.

**VERBATIM**

*"By invitation only."*

*"Areas of focus are provided & NPOs should tailor their applications around the area of focus they choose to submit against. A 'general purpose' application will not gain much traction—it has to truly align with the area of focus."*

*"All organizations need to request online."*

*"Strategy is changing, however, to limited focus areas and proposals by invitation."*

*"Talk to Human Resources."*

*"I don't know."*

*"Potential partners or grantees need to call our office directly."*

13. What are the key qualities that your company looks for in a nonprofit organization before you consider funding (e.g., strong business case or understanding of corporate mission and objectives)?

**VERBATIM**

*"Does the organization, program or idea align to the business objectives of my company? Do they advance a social or environmental cause, or are they merely advancing their own organization? Do we share the same goals for a potential sponsorship or partnership? How will the world be different—better—both organizations and the issue(s) we seek to address after the partnership is over? Will what we do or create together be sustainable?"*

*"Well managed—financially and Human Resources; reputation; population served; focus areas."*

*"Direct connection either to employees or clients."*

*"Fit with corporate giving guidelines. History of employee engagement."*

*"Fit to guidelines, strong and efficient organization, innovative programming."*

*“Community activism and sustainable program models with a direct impact on community individuals are vital to all the programs we support. Our focus is on Health, Environment & Inclusion.”*

*“Match with our focus—whether the program serves our philanthropic mission.”*

*“Powerful Brand. Strong infrastructure, flexibility, diversity.”*

*“We look for partners that are leaders in advocacy in their area of specialty. We also look for partners that can give us a return on our investment and have a strong presence in regions that we have a strong presence. We also look to our partners to be creative in their ability to promote the partnership for long-term growth rather than a yearly sponsorship.”*

*“1. Clear and focused mission for the org. 2. Solid financial footing 3. An understanding of our funding objectives and an ability to think programmatically in their grant requests.”*

*“Ability to drive social change; Integrity and thought leadership in community; Innovation and inventiveness; Advocacy and messaging capacity.”*

*“1. Within firm's footprint. 2. Areas of focus for the Foundation are: Arts, Education K-12 (including Financial education), Community Building.”*

*“Strong business case; goals and objectives akin to company's.”*

*“Relevance to our business.”*

*“Strict alignment with corporate direction.”*

*“The Foundation looks for 501(c)3 status, whether or not the organization is educational or not, preference is for focus on K-12, college or university education in science, technology, engineering & math (“STEM”), particularly as it relates to under-represented populations (minority/diverse students). The giving is not limited to this but focused in this area—also supports non-profits focused on diversity in general.”*

*“Can they get funding somewhere else? Are they really fulfilling their core mission?”*

*“Alignment with corporate mission and client linkage.”*

*“Alignment with key focus giving areas of the company (hunger/healthy lifestyles). Capacity to deliver programs in multiple geographies (multi-national). Capacity to develop and manage opportunities for employee engagement that correspond to key focus areas of giving.”*

*“Compliance with corporate funding objectives, strong leadership, proven track record, credibility and need.”*

*“Overall objectives that benefit the community.”*

*“Giving that will affect broad results, not just corporate image or specific organizations. Things that will change culture and perpetuate ongoing results vs. one-time results.”*

*“A way to tie in our donations with the causes of our clients, or utilize philanthropy to have a closer relationship with clients.”*

*“How it will “look” to clients.”*

13. What are the key qualities that your company looks for in a nonprofit organization before you consider funding (e.g., strong business case or understanding of corporate mission and objectives)? (continued)

**VERBATIM**

*“Leader in Field/Space  
Drives Innovation and Sustainability  
Demonstrated Legacy of Desired  
Impact/Change  
Ability to deliver on expectations/goal  
Channel & Reach (geographic & depth  
of target group)  
Reputation & Integrity  
Fit with business agenda  
Fills a white space  
Networked—Stakeholder engagement  
Strong relationship management  
skills/acumen”*

*“Whether or not the applicant’s request satisfies the requirements set forth by our Corporate Foundation. These requirements are available on our Internet site.”*

*“That is shares our values of Inclusiveness and Diversity, that it be non-discriminatory. That it be in some way related to our core mission, products and services.”*

*“Certainly strong business case; understanding of corporate mission & objectives, and MOST IMPORTANTLY how the NPO aligns with those objectives. Should pick one area to focus on--don’t try to be all things to all people just to get funding. Won’t work.”*

*“Align with the three E’s of our Corporate Responsibility Strategy: Entrepreneurship, Education, or Environment. Informally look at:*

- How it connects to our business or business processes like recruiting, marketing, retention*
- How we can get our people involved in opportunities that will help them develop personally including their networks*
- Which other companies are sponsors with whom we would like to associate*
- How innovative is the group without being bleeding edge*
- Professional and responsive to developing opportunities that are mutually beneficial rather than cookie cutter”*

*“Don’t know.”*

14. Do you accept unsolicited requests for funding?

55% Yes

45% No

15. Who within your company has the ability to allocate monetary or non-monetary resources to nonprofits? (Select all that apply.)

87% Corporate giving and/or foundation executive

36% Marketing

29% ERG leader

18% Local affiliates

0% Unions

20% Other

16. To what extent do departments (e.g., Human Resources, Communications, Marketing, etc.) at your company work together on strategic partnerships with nonprofits?

11% Always

33% Often

43% Sometimes

11% Rarely

2% Never

17. In what interest areas is your corporate philanthropy focused? (Select up to three.)

63% Education (e.g. elementary or secondary schools, colleges, universities, libraries, student scholarships or financial aid)

50% Public, societal benefit (e.g., civil rights and liberties, minority rights, disabled person's rights, women's rights, LGBT rights) voter education, community or economic development, policy research and development

39% Arts, culture, and humanities (e.g. museums, theater, symphony, opera)

39% Environment and animals (e.g., pollution control, resource conservation or protection, zoos, animal protection or welfare)

35% Human services (e.g., legal or employment services, hunger relief, housing and shelter, recreation, sports, youth development)

28% Health (e.g., direct healthcare services, hospitals, mental health, research on disease)

11% International, foreign affairs (e.g., international development, peace and security)

9% Other

45%

OF CORPORATE  
RESPONDENTS DO NOT  
ACCEPT UNSOLICITED  
REQUESTS FOR FUNDING



18. Do you think it is necessary to have an “internal advocate” to gain support for LGBT programs/organizations? If yes, who plays that role in your company or organization? If no, is supporting LGBT programs/organizations already an integral and institutional component of your company’s or organization’s giving?

91% Yes

9% No

**VERBATIM**

“Our ERG leader and members.”

“Community Affairs staff play that role.”

“Our ERG functions as advocate.”

“An internal advocate is generally necessary for ANY program/organization to get in front of the right people. The fact that the organization is LGBT doesn’t really matter.”

“Staff members and affinity groups.”

“We have a sales and marketing team for the LGBT Community.”

“Executive in the Corporate Social Responsibility group is an advocate and is also working with ERGs to help ensure a seat at the table.”

“There are several advocates in many parts of the company.”

“Not necessary, but helps. Decisions are made by Foundation, but internal contact can be useful. ERGs are the best place to start.”

“There are individuals within our philanthropy group who advocate for LGBT funding, which is supported by historical practice at the company. ERGs also provide support.”

“Foundation manager.”

“To my knowledge this would fall to ERG Leaders and Diversity and Inclusion executive leadership.”

“Employee LGBT group.”

“Program Manager for our philanthropic arm ---- but by accident, not by design. If the individual left the organization, there would be no one.”

“Chief Diversity Officer.”

“Foundation allies to the LGBT Community, ERGs, and Diversity and Inclusion Team.”

“We have no internal advocate at this time. We have a LGBT affiliate group.”

“ERG leaders; a LGBT steering committee across business units.”

91%

OF CORPORATE RESPONDENTS THINK IT IS NECESSARY TO HAVE AN “INTERNAL ADVOCATE” TO GAIN SUPPORT FOR LGBT PROGRAMS/ ORGANIZATIONS

19. Generally, what is the best way for LGBT nonprofits to initiate a relationship with your company?

73% Networking with company employee

7% Cold call

5% Unsolicited proposal

5% None, we reach out to organizations we wish to support

10% Other

 *Behind the Numbers:*

**GETTING OUT AND MEETING PEOPLE** Almost three-fourths (73 percent) of corporate respondents say that the best way for LGBT nonprofits to start a relationship with their company is to meet and network with a company employee. Based on this feedback from corporate respondents, nonprofits should engage their own staff, board and other donors in this process to help identify corporate contacts.

20. In the current economic climate, it is most important for companies to which of the following?

30% Fulfill existing philanthropic commitments

27% Refocus contributions to areas of greatest need

22% Refocus contributions to causes central to business strategy

14% Increase overall philanthropy

7% Other

21. What funding cycle (i.e., fiscal or calendar) does your company use to make philanthropic decisions? Additionally, when is the best time for a nonprofit to approach your company with a funding proposal?

 *Behind the Numbers:*

**TRACKING THE CALENDAR** Some companies have strict deadlines and long lead times, while others say they have rolling or ongoing deadlines for proposals. Nonprofits need to recognize that a company's fiscal year helps determine when, and sometimes how much, the company can donate or invest in projects.

21. What funding cycle does your company use to make philanthropic decisions? Additionally, when is the best time for a nonprofit to approach your company with a funding proposal? (Continued)

**STRICT**

*"The best time to approach our company for sponsorship or partnership is about 12-15 months before they need it. We have the opportunity for partnership not only with our company, but with our clients. The best chance for funding takes time to build through relationships and networking."*

**SPECIFIC (FALL)**

*"At the end of a calendar year, prior to next year's budget being locked down. End of Q3."*

*"We are on a calendar year and ask our partners to ask for support in the late Fall around November time frame for consideration the following calendar year."*

*"For the following year, best to begin discussions as early as possible the year before to be part of next year's budget."*

*"ERGs follow business cycles with autumn being the time final budgets are locked down. Summer is planning season. Philanthropy is on a more revolving cycle depending on the \$ amount we follow a semi-annual grant making cycle."*

*"Fall is best."*

*"End of fourth quarter."*

*"September/October."*

*"Budgeting begins in Dec for a July-June year. November / early December."*

**SPECIFIC (Spring / Summer)**

*"First or second quarter of the year."*

*"The Foundation is on a calendar year funding cycle (which also coincides with our fiscal year). Best time for non-profits to approach is in the July-Sept timeframe when we are planning and budgeting for the following year's annual plan / operating budget."*

*"Beginning of the year (January)."*

**PERIODIC**

*"Quarterly."*

**LOOSE**

*"Open."*

*"Can establish contact with employees anytime."*

*"Rotating deadline."*

*"Don't know about the foundation arm, but all ERGs and Marketing teams can provide support throughout the year based on their internal budgets."*

*"Ongoing."*

*"Fiscal, rolling deadline."*

## THE NONPROFIT SUPPORT THEY WANT TO GIVE

---

22. Which one of the following corporate resources do you feel has the greatest potential to help address social issues?

- 38% Cash grants
- 29% Pro bono services
- 27% Employee volunteers
- 4% Product donations
- 2% Other

### Behind the Numbers:

**THE CREATIVE CHASM** Sixty-two percent of corporate respondents say that something other than cash—such as pro bono services and employee volunteers—has the greatest potential to help address social issues. However, nonprofits overwhelmingly see program grants and event sponsorships (73 percent combined) as having the greatest potential to help their organizations. (Question 13, Nonprofit Version)

Strategic, long-term, mutually beneficial partnerships between nonprofits and corporations are built by and between people. While cash grants are obviously important, this seems to only speak to the more immediate needs of nonprofits. Being creative about engaging other corporate resources—such as employees, pro bono services, or product—can help nonprofits gain access to, begin constructive partnerships with, and connect with an internal advocate at a company.

23. To what extent, if at all, do you expect the amount of collaboration between your company and other businesses in corporate philanthropy to change over the next five years?

- 49% Moderate or slight increase in collaboration
- 24% Substantial increase in collaboration
- 22% No change
- 5% Moderate or slight decrease in collaboration
- 0% Substantial decrease in collaboration

### Behind the Numbers:

**PARTNERING UP** Almost three-fourths (73 percent) of corporate respondents say they expect more collaboration on their philanthropic initiatives in the next five years. Companies are thinking about strategic partnerships, creative collaborations and other ways to better leverage limited resources and maximize their own unique assets. Nonprofits must keep this in mind as they look to build relationships with corporations, and think through innovative opportunities to bring in other nonprofits, companies, or government agencies in a proposed partnership. Companies may want to see that you have looked for and developed unique collaborations that make the opportunity truly unique and rewarding.



## THE NONPROFIT PARTNERSHIPS THEY'VE BUILT

---

24. Is your company currently collaborating with other businesses in its corporate philanthropy program?

59% Yes

41% No

---

25. Describe one particularly innovative partnership between your company and a nonprofit.

Please include the following:

A. Program name and brief description

B. Partner organization(s)

C. Approximate cash and non-cash contributed to the program

D. Description of the impact the program hopes to make and how it will be measured

Responses to this question are included in more context and deeper descriptions in *Chapter 6: Case Studies: Profiles in Corporate-Nonprofit Partnerships*.

26. If applicable, please use the same criteria to describe an innovative partnership between your company or organization and an LGBT nonprofit.

Responses to this question are included in more context and deeper descriptions in *Chapter 6: Case Studies: Profiles in Corporate-Nonprofit Partnerships*.

27. Please provide any key tips that you think are critical for nonprofits to know when seeking corporate support.

### TIPS FROM CORPORATIONS TO NONPROFITS

*"Know the business (and its brand and objectives) that they're pitching to."*

*"Be strategic. Build relationships."*

*"Get creative. Think about new ways to connect their mission and programs to that of the business."*

*"Think about the business cycle and what it means to possible donations and partnerships (fiscal year, product development, etc.)"*

*"ALWAYS read their corporate giving guidelines! Don't discount ERGs as a source of volunteers and support."*

*"Understand the reasons for making funding decisions."*

*"Establish a good understanding of the corporation's values, mission, giving strategies and focus areas. Be knowledgeable about the types of contributions the corporation makes (grants, strategic, capital, etc.) and its geographic giving areas. This information is typically easily accessible and available online."*

*"The true business case is always important! Meeting commitments (e.g. deliverable dates) after the \$\$\$ has been received and the project has been kicked-off is always important. Many nonprofits are not familiar with how companies run projects...so they must ensure that communication occurs...in order to get future funding."*

*"Learn about the business model of the company to understand value proposition."*

*"Be able to demonstrate the benefit to my company to support your organization."*

*"I need to show a return on my investment, ability to engage new and existing customers and engage our employees."*

*"When you show these three areas it makes it much easier to quantify a great relationship."*

*"Nonprofits should remember they are each brands and are selling themselves and their brand promise. They need to be able to articulate their mission and also understand how that mission aligns with the mission of a funder."*

*"Understand the giving priorities and rationale, as well as how the corporate giving is structured."*

*"Know the funding parameters and goals of the organization you are approaching."*

*"Be persistent but patient. It takes a long time to work things through a large organization."*

*"Persistence is key, especially when dealing with corporate entities. Also, having a contact name is invaluable."*

*"Tie it to the communities they have corporate offices in, to their employees."*

*"Sustaining and cultural changing ideas that will not just meet a need but change the overall long-term outcome."*

*"Align asks with corporate mission, what's in it for the firm's revenue generators and work to know everyone who might be in the mix."*

*"Timing, timing, timing...be prepared in your grant writing and meet the prescribed deadlines. Grant should be crisp, focused, and answer the questions asked honestly and fully, with a mindset toward showing how the two could partner using shared objectives. Define what success looks like for both sides. Use tangible numbers."*

*"While commitments need to be fulfilled, so do giving strategies need to be aligned with business strategy."*

*"NGOs and CBOs have a clear but open agenda—seek to "serve or achieve" a common fit. All players must identify, negotiate + define what success is, have ways to measure & achieve success. The BEST partnerships take time to be nurtured, respected, communicated & celebrated."*

*"I think it is important to not look at it as 'support'—it is best deemed a partnership. In this climate, for the most part, the company will want to gain something out of it—so be prepared to let them know how the company will benefit (financially, image, teambuilding etc.)"*


*"Most critical is demonstrating the alignment between the mission of the nonprofit and the strategy of the corporation—clearly articulating the benefit of a relationship with the nonprofit to the corporation and its stakeholders."*

*"Research prospects carefully to find alignment. Be specific about the return on investment for the company and the community to be impacted. Think creatively about non-traditional corporate entities rather than the same 10–15 always approached. Tie to workforce development and recruitment of next gen workers."*



**ESTABLISH A GOOD UNDERSTANDING OF THE CORPORATION'S VALUES, MISSION, GIVING STRATEGIES AND FOCUS AREAS. BE KNOWLEDGEABLE ABOUT THE TYPES OF CONTRIBUTIONS THE CORPORATION MAKES (GRANTS, STRATEGIC, CAPITAL, ETC.) AND ITS GEOGRAPHIC GIVING AREAS.**

“ Nonprofits wanting to work with companies should consider how their partnership helps the company create a better, safer, more equitable work environment for all people.



# A Guiding Glossary

## Terms from the landscape

As the landscape of corporate philanthropy evolves, so too does the terminology used to describe and define it. Changing corporate structures and “org charts,” unusual department names, and rapidly emerging disciplines all complicate the landscape and make it difficult to navigate. *Chapter 3: A Guiding Glossary* highlights some of the more important terms to help nonprofit professionals, as well as corporate employees themselves, find resources, develop relationships and create effective partnerships.<sup>1</sup>

<sup>1</sup> Some references in this chapter were aided by *Wikipedia, the free encyclopedia*. Retrieved September-October, 2009



## ... BUSINESS UNIT

A **Business Unit**—sometimes known as a **Strategic Business Unit**, **Division**, **Affiliate** or **Segment**—is an operating structure that exists within an overall corporate entity. Most often associated with large, multi-national corporations, **Business Units** are often self-contained, separately managed organizations that have their own business strategies, objectives, brands and competitors that differ from that of the parent company.

### *Why This Is Important:*

**MANY POSSIBLE POINTS OF ENTRY.** **Business Units** can be an important point of entry, especially for smaller and/or local nonprofits. **Business Units** are not necessarily located within a larger corporation's headquarters or main campus, but instead might have a more local presence. Local organizations wanting to establish a partnership with a large corporation may find that company has a **Business Unit** nearby that has an interest in partnering with local organizations.

## ... CAUSE MARKETING

**Cause Marketing**—or **Cause-Related Marketing**—refers to a type of marketing where a company connects the marketing of a product or service to a cause and/or a nonprofit. **Cause marketing**—sometimes the responsibility of the marketing organization, while other times the responsibility of individual employees embedded in the business—differs from **Corporate Philanthropy** or **Corporate Giving**, in part, because it is a marketing relationship with expenditures that are not generally tax-deductible.

### *Why This Is Important:*

**CREATING SOMETHING NEW FOR CONSUMERS TO CONSIDER.** **Cause Marketing** has been around for decades, giving consumers the choice to support a cause through buying a product. Nonprofits might consider working with a company to co-brand a product related to their cause, and share the revenue from its sale.

## ... COMMUNICATIONS (EXTERNAL)

Most large organizations have a **Communications** department, while smaller ones might have specific personnel dedicated to coordinating external messaging. This department or employee may also be labeled **Strategic Communications**, **Corporate Communications**, **Press**, **Press Relations**, **Public Relations** or **Media Relations**. Common activities may include writing press releases, speaking at conferences, developing and executing events, and working with the press.

### *Why This Is Important:*

**MESSAGES FROM MANY PLACES.** Not all organizations use the same terminology for their communications structure. But a communications strategy to external stakeholders and the media regarding a company's philanthropy can be an important part of developing awareness of and support for a nonprofit partnership. That strategy should begin by understanding an organization's communications structure and the roles and responsibilities of the personnel in it.







## EMPLOYEE RESOURCE GROUP (ERG)

An **Employee Resource Group (ERG)** is a network of employees who share a common identity, characteristic or set of interests. **ERGs** exist for the betterment of not just the employees involved in the group but the company as a whole. **ERGs** engage members and other employees in initiatives and activities that try to ensure a work environment in which each candidate, employee and customer is treated with respect, dignity, fairness and cultural sensitivity. **ERGs** may go by other names, including **Business Resource Groups (BRGs)**, **Affinity Groups (AGs)** or **Employee Networks**, among others.

### *Why This Is Important:*

**FIND AND CHOOSE YOUR CHAMPION.** **ERGs** have passionate employees and sometimes have their own budgets. ERG leaders can be seen as crucial champions for LGBT issues in a company, and should be engaged early in any attempt to develop a partnership with a company. **ERGs** might also understand how to create a business case internally for supporting nonprofit organizations.

## FISCAL YEAR

Sometimes known as a **Financial Year** or **Budget Year**, a **Fiscal Year** is the period used for determining and calculating an organization's official financial statements, including revenue and expenses. Fiscal years vary between companies and countries. In the United States, most companies align their fiscal years to the calendar year, January 1 through December 31.

### *Why This Is Important:*

**USE IT OR LOSE IT.** Before the **Fiscal Year**, departmental budgets for cash and in-kind donations are generally discussed and determined. However, sometimes budgets are not used up completely by the end of the **Fiscal Year**. There might be pressure on a department to spend extra budget in the final months of the **Fiscal Year** or risk losing it the following year. Nonprofits should be aware of a potential partner's **Fiscal Year** and consider reaching out to them a few months before the end of the year to discuss opportunities—whether to help wrap up and use remaining resources at the end of the year or to plan for new spending in the following year.



## ...❖ GOVERNMENT AFFAIRS

Sometimes referred to as **Government Relations (GR)** or **Public Affairs (PA)**, **Government Affairs (GA)** is a discipline that refers to an organization's relationships and strategy related to government agencies and officials, politicians and public policy. Sometimes, the work that **GA** conducts on behalf of an organization is officially defined as lobbying—the practice of influencing decisions made by the government. It includes all attempts to influence legislators and officials, whether via other legislators, constituents or organized groups. Governments often define and regulate organized group lobbying.

### *Why This Is Important:*

**RECRUIT PUBLIC ADVOCATES.** When companies lobby for good, they are on the right side of the law. In the United States, corporate foundations cannot use foundation funds for direct lobbying, nor can companies reap direct benefits from their foundations. But as long as companies themselves are doing the advocacy, often through **GA**, corporate lobbying for good does not incur any more legal requirements than does conventional lobbying. Companies also need to recognize that lobbying for good is another way to build better relationships with policy makers.<sup>3</sup> Many companies use their **Corporate Philanthropy** and **CSR** programs to show that they are making a difference with policymakers' constituents. They can also use their **GA** teams to advocate for important causes. Nonprofit organizations that are looking for strong voices and connections should consider requesting time from companies' **GA** staffers rather than just checks.

## ...❖ HUMAN RESOURCES (HR)

**Human Resources (HR)** refers to how organizations manage their people. Two of the most important terms that usually fall in the world of **HR** are recruitment and retention. Some companies may have recruitment goals related to talent and diversity; spend money finding, educating and training its workers; and develop programs to retain them.

### *Why This Is Important:*

**HELP MAKE DIVERSITY A PRIORITY.** Nonprofits wanting to work with companies should consider how their partnership helps the company create a better, safer, more equitable work environment for all people. This can help an **HR** department with recruitment and retention of employees, reducing their costs and demonstrating return on investment (ROI).

<sup>3</sup> Lobbying for Good. Kyle Peterson & Marc Pfitzer. Stanford Social Innovation Review. Winter 2009.



## LEARNING & DEVELOPMENT (L&D)

**Learning and Development (L&D)** in companies usually focuses on the professional development, training and education of employees. **L&D** departments may offer, and sometimes require, employees to take courses, attend seminars, or gain additional training that exposes them to new ideas, strategies, developments, best practices or regulations related to their jobs or industries.

### *Why This Is Important:*

**CONDUCT YOUR OWN L&D.** Nonprofit organizations might consider working with people or departments related to **L&D** to understand its priorities, strategies and upcoming schedule. There might be opportunities for the nonprofit to partner with **L&D** to develop new offerings for company employees through guest speaking/lecturing at a seminar, developing a co-branded workshop, or creating new curricula for employees.

## LOCAL/REGIONAL OFFICES

Multi-national companies, big nonprofits and other large organizations may have **Local or Regional Offices**, college campus chapters, or affiliate locations to carry-out their missions in a particular location.

### *Why This Is Important:*

**THINK LOCAL, ACT LOCAL.** Even though local or regional offices are part of the same larger organization, they may have more flexibility to support or partner with nonprofit organizations in their respective regions. They may also have separate cash and in-kind resources that the headquarters office does not.

## MARKETING

**Marketing** is a term that can encompass many activities that a company does to create and keep customers. There are many disciplines that may relate to **Marketing**, including advertising, sales, public relations and more. Other marketing departments—like **Brand Marketing** or **Integrated Marketing**—might link more directly to the company effort to coordinate activities across departments to maximize the power, perception and penetration of the company's brand, products, services or image. Some marketing functions—like **Cause Marketing**—relate directly to the company's efforts to connect its products to social, environmental or other causes.

### *Why This Is Important:*

**JUST ONE AVENUE FOR FUNDING.** In the past, sponsorship money, particularly for events, came from **Marketing** departments as events provided the highest brand visibility for the corporate partner. While **Marketing** dollars may still be used for this purpose, and perhaps others as well, expectations for ROI have grown from companies looking to deepen relationships with their nonprofit partners. **Marketing** is but one of a number of points of entry for a nonprofit organization.



## PRO BONO

A phrase derived from the longer Latin phrase *pro bono publico*, **Pro Bono** means *for the public good*. The term is generally used to describe voluntary professional work done for free as a kind of public service. **Pro Bono** work is most commonly associated with the legal profession but is also used in other professional service organizations like public relations, business consulting and technology.

Pro bono work by corporate strategy professionals has the potential to deliver more than \$1.5 billion per year in services to the nonprofit sector.

(Source: Taproot Foundation)

### Why This Is Important:

**GO WHERE CASH CAN'T.** Many companies offer **Pro Bono** services. Some have **Pro Bono** services housed in single departments, while others allow individual employees to spend a certain number of hours a year on **Pro Bono** work. This may be a great way for nonprofits to get valuable corporate support without the company having to outlay cash. Many companies are exploring ways to expand their **Pro Bono** work, strategically aligning these efforts with the skill sets of their employees.

Over 6.7 million professionals in corporate America have skills that are highly relevant to solving challenges faced by the nonprofit sector.

(Source: Taproot Foundation)

## PRODUCT DONATIONS

Most companies that engage in some kind of corporate giving, citizenship or corporate responsibility—and that produce products—donate some of those products to nonprofits every year.

### Why This Is Important:

**THE POWER IN PRODUCT.** Companies may have more flexibility to donate product, than they do to donate cash. For example, during a recession, excess product may sit on store shelves because consumer spending is down. However, soon stores might need to make room on-shelf for new product deliveries. To avoid sending the unsold product to landfill, companies may seek to donate it to nonprofits and community groups. So despite a bad economy—or even because of it—nonprofits should think more creatively about how to use product to support their work, instead of just cash.

97% of nonprofit leaders agree that pro bono resources could increase their social impact.

(Source: 2009 Deloitte Volunteer IMPACT Study).

Employees who contribute professional or management skills have higher volunteer retention rates.

(Source: Volunteering in America: 2007 State Trends and Rankings, Corporation for National and Community Service).



## •••• PUBLIC AFFAIRS

In addition to its connection to **Government Affairs** in some organizations, **Public Affairs** is a broadcasting industry term that refers to programming that focuses on public policy, government, politics and issues (e.g., environment, education, economy) facing the public. **Public Affairs** might be separate from a news department, dedicated to creating and coordinating longer-form programs and documentaries, online content, and grassroots or community events.

### *Why This Is Important:*

**PLANNING FOR PROGRAM INTEGRATION.** For cable and broadcast television and radio networks, the **Public Affairs** personnel might work with departments throughout the organization to integrate social or environmental messaging into programming. Video news segments, short- and long-form documentaries, public service announcements (PSAs), online content and webisodes, character development and casting, intra-program storylines and more might be in the purview of **Public Affairs** personnel. Moreover, these employees might develop, create and coordinate partnerships with corporate advertisers and foundations that want to associate with a particular issue or topic. Nonprofits might consider approaching **Public Affairs** with creative ideas to develop and integrate messaging into various aspects of television, radio and online programming.

## •••• SOCIAL INNOVATION

Social Innovation is an emerging discipline built around the power of people to drive social and environmental change inside, outside and across organizations and industries of all kinds—including corporations, nonprofits, educational institutions and government agencies.

### *Why This Is Important:*

**NEW OPPORTUNITIES FOR UNIQUE PARTNERSHIPS.** President Barack Obama recently announced his own Department of Social Innovation and the \$50 million Social Innovation Fund; Stanford University has a Center for Social Innovation; and Weber Shandwick has a global think tank and specialty group called Social Innovation. Nonprofit organizations should be open to exploring unique ideas and partnerships between and among industries and sectors to tap into opportunities related to this emerging discipline<sup>4</sup>.



Nonprofits should be open to exploring unique ideas and partnerships between and among industries and sectors to tap into opportunities related to this emerging discipline.



<sup>4</sup> President Obama to Request \$50 Million to Identify and Expand Effective, Innovative Non-Profits. Whitehouse.gov. May 5, 2009.



## .... SUPPLY CHAIN

A **Supply Chain** is a system of organizations, people, technology, activities, information and resources involved in moving a product or service from supplier to customer. Supply chain activities transform natural resources, raw materials and components into a finished product that is delivered to the end customer. In sophisticated supply chain systems, used products may re-enter the supply chain at any point where residual value is recyclable.<sup>5</sup>

### *Why This Is Important:*

**EXTEND TO EMPLOYEES BEYOND THE COMPANY.** Some companies go beyond their own employees, and focus on opportunities for social or environmental responsibility and innovation throughout their **Supply Chain** in order to help create supplier diversity. Nonprofits looking to develop creative partnerships might consider how their ideas might expand and impact partners, suppliers and workers throughout the **Supply Chain** of a potential corporate partner. **Human Resources** or **Diversity & Inclusion** may also examine their companies' vendors to ensure that the **Supply Chain** is diversified.

## .... SUSTAINABILITY

A company might also have a **Sustainability** department or initiative that is part of or distinct from its **CSR** organization. **Sustainability** in a company will generally focus on its environmental impact and seek to monitor, report on, and reduce it. However, some progressive-thinking companies have begun to link environmental sustainability to social sustainability, recognizing that healthy people require a healthy planet over the long term with issues like access to clean water, the reduction of greenhouse gases, and the conservation of natural resources.

### *Why This Is Important:*

**LINK OUR PLANET TO ITS PEOPLE.** With natural resources in limited supply, many companies see **Sustainability** initiatives as business critical over the long term. **Sustainability** can take on a broader notion, and people committed to developing, implementing and promoting a company's **Sustainability** initiatives, may also be open to linking planet-focused programs with people-focused programs.

<sup>5</sup> *Supply Chain Network Economics: Dynamics of Prices, Flows, and Profits.* Anna Nagurney. Edward Elgar Publishing, 2006



## TRIPLE BOTTOM LINE

The **Triple Bottom Line**—or TBL, 3BL or **People, Planet, Profit**—captures an expanded spectrum of values and criteria for measuring organizational and societal success: economic, ecological and social. A fourth bottom line, culture, has recently been suggested by Adam Werbach, former president of the Sierra Club, through his book, *Strategy for Sustainability*.<sup>6</sup>

### *Why This Is Important:*

**GOING PAST PROFIT.** The **Triple Bottom Line** is often the lens through which companies create and describe their **CSR** or **Sustainability** commitments. In fact, many reporting organizations—like the Global Reporting Initiative (GRI)—require that companies issue their Corporate Responsibility Reports or **Sustainability Reports** by clearly stating objectives and reporting on progress in each of the three bottom lines of the **Triple Bottom Line**. Companies that adhere to reporting guidelines like those issued by GRI, or otherwise use language consistent with the Triple Bottom Line, may be open to measurement on nonprofit partnerships tied to soft metrics of people, planet and profit, rather than money or return on investment.<sup>7</sup>

## VOLUNTEER DAYS, WEEKS AND EVENTS

Organizations often create specific days, weeks, or events around a particular cause or issue that employees are given the option to attend or support.

### *Why This Is Important:*

**GET INSIGHT INTO THEIR ISSUES.** Nonprofit organizations should watch the kinds of issues that companies support and when they support them. Company executives and employees are often passionate about a variety of causes, where sometimes just one person drives a company's significant involvement. Nonprofits should try to understand the landscape of a company's volunteer program and commitment and consider building partnership opportunities that align with them.

<sup>6</sup> *Strategy for Sustainability: A Business Manifesto*. Adam Werbach. Harvard Business Press, 2009

<sup>7</sup> Globalreporting.org.



**SUPPORTING, PARTNERING WITH, AND  
OTHERWISE ENGAGING LGBT NONPROFITS  
ENHANCES A COMPANY'S PLACEMENT ON SEVERAL  
INDICES FOR DIVERSITY AND INCLUSION,  
CORPORATE CITIZENSHIP AND SOCIAL  
RESPONSIBILITY, AND INNOVATION.**

“**This year, an estimated 10,000 Baby Boomers will turn 62—each day. And in the next 10 years, 43 percent of the working population will become eligible to retire. Furthermore, research conducted by Deloitte indicates that there will be fewer young people to replace retiring workers every year for the next 30 years. With such staggering labor shortages projected well into the future, businesses simply cannot afford to neglect the individuals of any demographic group as employees or as candidates for future leadership.**

—Sharon Allen, Chairman of the Board, Deloitte, LLP  
Keynote Speech at Out & Equal Workplace Summit, October 2009



# Rating Equality

## Organizations and Indices

LGBT nonprofits and corporate partners can offer each other mutually beneficial resources. Among them is talent recruitment and retention. Supporting, partnering with, and otherwise engaging LGBT nonprofits enhances a company's placement on several indices for diversity and inclusion, corporate citizenship and social responsibility, and innovation. *Chapter 4: Rating Equality: Organizations and Indices* offers background information on a few notable organizations that evaluate, rate, support or promote companies advancing LGBT equality in their work or workplace. Nonprofits should consider how the resources, surveys, statistics and studies from these organizations can be incorporated into proposals or partnerships with a company. Corporate readers should find some of this information useful as a benchmarking tool when evaluating their own companies and LGBT initiatives.



## HRC's Corporate Equality Index

[www.hrc.org/workplace](http://www.hrc.org/workplace)

Since its beginning in 2002, the HRC Foundation's annual Corporate Equality Index (CEI) has provided major U.S. businesses with a roadmap for establishing and maintaining inclusive workplaces for LGBT employees. The number of employers rated from the first CEI to the present has jumped from 319 to 590; it has quickly become the premier benchmark for businesses to gauge their success on LGBT inclusion against competitors.



The CEI has quickly become the premier benchmark for businesses to gauge their success on LGBT inclusion against competitors.



The largest and most successful U.S. employers are invited to participate in the CEI and are identified through the following lists:

- *Fortune* magazine's 1,000 largest publicly traded businesses
- *American Lawyer* magazine's top 200 revenue-grossing law firms

*Forbes* magazine's ranking of the 200 largest private businesses is also included in CEI results, but HRC cannot guarantee that each was invited because contact information is not as easily accessible as for the *Fortune* and *AmLaw* lists. Any company with more than 500 employees may also request to be surveyed.

Businesses that achieve a rating of 100 percent in this report are recognized as Best Places to Work for LGBT Equality. See [www.hrc.org/placestowork](http://www.hrc.org/placestowork).

### Businesses are rated on the following six categories:

1. Non-discrimination policy, diversity training—sexual orientation
2. Non-discrimination policy, diversity training and benefits—gender expression or expression
3. Partner benefits
4. LGBT employee resource group/diversity council
5. Appropriate and respectful advertising and marketing or sponsorship of LGBT community events or organizations
6. Responsible behavior toward LGBT community; does not engage in action that would undermine equality

### HIGHLIGHTS

- **HRC Employer Search**, a free online database of several thousand U.S. employers, available at [www.hrc.org/employerssearch](http://www.hrc.org/employerssearch). Detailed information on each employer rated in the CEI is included.

- **Buying for Equality**, a consumer-oriented guide based on CEI ratings, available at [www.hrc.org/buyersguide](http://www.hrc.org/buyersguide). Distributed every November to coincide with the start of the winter holiday and shopping season, the guide offers LGBT consumers—with an estimated buying power of \$759 billion in 2009, according to Witeck-Combs market research—an accessible reference to the most recognizable consumer brands and their corresponding CEI rating.
- **Best Places to Work 2010**, a listing based on CEI results and segmented by industry.
- **Top Law Firms for Equality**, a list of surveyed law firms as part of the CEI ratings.

### WHY THIS IS A GOOD RESOURCE

A CEI rating cannot convey all the nuances of a business' particular approach to LGBT workplace inclusion, but it can be a baseline reference for employers, as well as current and potential employees, consumers, investors and potential nonprofit partners.

Eighty-three percent of CEI-rated businesses report some form of external engagement with the LGBT community, through marketing, advertising and recruitment efforts or philanthropic contributions to LGBT organizations. Through philanthropic financial support or donations of products or services, businesses can support LGBT nonprofits. Typically, this is strategically connected to the core business of a company.

The employer database provides information on whether or not the company is engaged in some form of activity with LGBT nonprofits. It also includes contact information for the company's Employee Resource Group for organizations looking for an introduction or point of entry to a company. For large companies with local or regional offices, this could be a good place for local and regional organizations to make an initial contact, as well as for national organizations.

Go to [www.hrc.org/workplace](http://www.hrc.org/workplace) for full details on all reports.

## DiversityInc. Top 50

[www.diversityinc.com](http://www.diversityinc.com)

Now in its 10th year, DiversityInc's Top 50 competition involves a detailed, analytic survey of more than 200 questions. The overall intent is not just to track metrics but to draw an accurate picture of a company's culture.

The survey is sent annually to any company requesting it that has more than 1,000 U.S. employees. Companies are assessed within the context of their industries and employee skill sets. The questions have predetermined weightings and are evaluated based on ratios of certain questions, such as work-force demographics compared with new-hire demographics, and relativity of one subject to another, such as mentoring best practices and management promotions.



**Companies must demonstrate consistent strength in four key areas:**

- **CEO Commitment** is the most heavily weighted area in the survey. Questions examine the CEO's personal involvement in diversity, how she holds executives accountable for diversity success and board-of-director demographics.
- **Human Capital** includes race, ethnicity, gender and age demographics questions surrounding the work force, new hires, management by levels, promotions and retention. The category does not count demographic areas in which companies significantly over-index demographically. This category also includes questions on work-life benefits and recruitment strategies, including those aimed at LGBT people and people with disabilities.
- **Corporate and Organizational Communications** examines such internal factors as employee-resource groups, mentoring and employee surveys, and such external factors as philanthropic contributions, multicultural marketing and website communication of diversity branding.
- **Supplier Diversity** looks at percent of procurement budgets spent with suppliers owned by Blacks, Latinos, Asians, American Indians, women, LGBT people and people with disabilities. It also examines whether supplier-diversity numbers are audited and have third-party certification; whether companies include supplier diversity in their requests for proposals (RFPs); and whether they mentor suppliers and offer them financial assistance.



DiversityInc also examines the company's web site to assess its visible commitment to the LGBT community.



*Any company that does not offer health benefits to same-sex partners of employees is automatically excluded from the DiversityInc Top 50 and the 11 specialty lists.*

**HIGHLIGHTS**

- **DiversityInc Top 10 Companies for LGBT Employees**, one of the specialty lists that strives to determine what companies are the right place for LGBT employees and their friends and families to work. They review several factors, including inclusive benefits for same-sex partners of employees, strong diversity training programs, recruitment efforts aimed at LGBT people and the vitality of the company's LGBT employee-resource group.

Since workplace demographic data on LGBT employees is inconclusive (most companies don't ask about orientation, and even those that do believe a certain segment is uncomfortable coming out), they also include ratings from HRC's CEI.

DiversityInc also examine the company's web site to assess its visible commitment to the LGBT community, as well as its relationships with external LGBT organizations. They give companies extra points for marketing to the LGBT community and for use with LGBT suppliers certified by the National Gay and Lesbian Chamber of Commerce.

## WHY THIS IS A GOOD RESOURCE

All the companies listed on the Top 10 Companies for LGBT Employees also have a 100 percent HRC CEI rating. And, 74 percent of The 2009 DiversityInc Top 50 Companies for Diversity received a 100 percent CEI rating this year, compared with 52 percent in 2006 and 28 percent in 2004.

Much like HRC's CEI, DiversityInc's lists provide a clear, brief snapshot of a company's commitment to LGBT efforts. Such information is invaluable to nonprofit organizations seeking partnerships with these companies or for those preparing for a meeting with one of the companies. The listing also indicates other Top 10 lists the company is noted on based on other DiversityInc ratings, including Top 10 Companies for Executive Women, Top 10 Companies for African-Americans, etc.

Go to [www.diversityinc.com](http://www.diversityinc.com) to view details on the 2009 Top 10 Companies for LGBT Employees.

## Fortune 100 Best Companies to Work For

[www.money.cnn.com/magazines/fortune/bestcompanies](http://www.money.cnn.com/magazines/fortune/bestcompanies)

The 2009 100 Best Companies to Work For® list provides welcome and much-needed good news to employees, employers and the broader public. On average, 90 percent of employees from the workplaces represented on this year's list say their organizations are great places to work.

To choose the 100 Best, Fortune conducts the most extensive employee survey in corporate America. More than 81,000 employees completed the Trust Index® survey, created by Great Places to Work Institute, as part of the list competition, with 26,000 of those employees representing the companies that made the 100 Best list. They offered their views on the credibility of their leaders, the respect they experience, and the fairness of policies and practices in the workplace. They also spoke of the pride they feel in the work they do and reputation of their companies, and of the tremendous camaraderie they experience among their co-workers.

Ninety percent of employees believe that management is honest and ethical in its business practices; 92 percent believe that they make a difference at work; and 90 percent experience pride when they consider their accomplishments.

As has been the case in the past, this year's 100 Best continue the tradition of confirming that great workplace practices—treating people well, sharing information and answering questions, and investing in employee's professional development—all combine to contribute positively to the bottom-line. At the Best Companies, turnover is lower, recruiting is easier and employee morale is stronger than at other workplaces across the country. Over the long term, the publicly traded 100 Best Companies continue to outperform the S&P 500 and the Russell 3000.

Over the long term, the publicly traded 100 Best Companies continue to outperform the S&P 500 and the Russell 3000.



Companies on this year's list added more than 57,000 new full-time and 22,000 new part-time jobs during the last year and invested significantly in training opportunities for the people who took them.

Any company that is at least seven years old with more than 1,000 U.S. employees is eligible.

### HIGHLIGHTS

Some of the categories rated for this report are of particular interest to LGBT employees and nonprofit organizations, since the rating is determined by company employees. Gay-friendly benefits and policies are two such rating categories.

The following benefits are evaluated in the survey:

- **100% Health Care:** Companies that pay 100 percent of an employee's health-care premium
- **Onsite child care:** Companies that provide an on-site child care center
- **Telecommuting:** Companies that allow employees to telecommute or work at home as a regular work arrangement (i.e., where employees telecommute or work from home at least 20 percent of their time)
- **Job sharing:** Companies that offer employees a job sharing program (e.g., two people share one job)
- **Compressed workweek:** Companies that offer employees compressed workweeks (e.g., work four 10-hour days and take Fridays off) on a year-round, regular basis.
- **Fully paid sabbaticals:** Companies that offer fully paid sabbaticals
- **Onsite gym:** Companies that have an on-site fitness center
- **Gym discounts:** Companies that subsidize off-site fitness center memberships
- **Gay-friendly benefits:** Companies that offer domestic partner benefits for same-sex couples (where permitted by law)
- **Gay-friendly policy:** Companies that have a written non-discrimination policy that includes sexual orientation

### WHY THIS IS A GOOD RESOURCE

Of the 2009 Top 100 companies, 42 are rated in the HRC's CEI and 31 of the 42 received a rating of 100 percent.

As we know from the CECP survey mentioned throughout this guide, employees are critical stakeholders in helping to determine a company's giving strategy. In cross-referencing this report with the HRC CEI, we can get a bit of a sense for the climate for LGBT employees in these companies though recognize that it is not necessarily an exact snapshot. Companies also receiving strong CEI ratings may make good potential partners for LGBT nonprofit organizations.

Go to [www.money.cnn.com/magazines/fortune/bestcompanies](http://www.money.cnn.com/magazines/fortune/bestcompanies) to view details on the 2009 Top 100 Best Companies to Work For.

# Out & Equal™ Workplace Advocates

[www.outandequal.org](http://www.outandequal.org)

Out & Equal™ Workplace Advocates is the pre-eminent national organization devoted to the LGBT community in the workplace. Out & Equal's mission is to educate and empower organizations, human resource professionals, Employee Resource Groups (ERGs) and individual employees through programs and services that result in equal policies, opportunities, practices and benefits in the workplace regardless of sexual orientation, gender identity, expression or characteristics.

Out & Equal Workplace Advocates' regional affiliates produce local educational and networking events in order to share best practices and discussions about important LGBT workplace issues. These events provide an effective way for Out & Equal to serve the needs of individual employees, leaders of ERGs and human resources professionals. Out & Equal regional affiliates are organized and led by local regional councils, ensuring that they have the flexibility to meet the needs of the local community while still being connected to the national organization.

## HIGHLIGHTS

Out & Equal has several resources to assist ERG leaders and that can also be helpful to nonprofit organization leaders:

- **ERG Registry**, an online tool to facilitate networking among ERG leaders.
- **Out & Equal Town Calls** offer valuable education and awareness building of current workplace topics.
- **Workplace Summit**, an annual event that provides educational and networking opportunities to meet other ERG leaders and leading LGBT workplace advocates from around the world.

## WHY THIS IS A GOOD RESOURCE

For the nonprofit professional, the local Out & Equal Regional Affiliate listing is a good place to start to try to identify local business leaders in their community. Networking with those involved in the program can potentially provide a point of entry for conversation with participating corporations about partnering at the local level. As we learned from the Corporate Version of our *Business of Change* survey detailed in Chapter 2 of this guide, more than 90 percent of corporate respondents thought it necessary to have an "internal advocate" to gain support for LGBT programs/organizations with most of those respondents citing the ERG as a good starting point. Further, almost three-fourths (73 percent) of corporate respondents indicate that the best way for LGBT nonprofits to start a relationship with companies is to meet and network with a company employee. The Out & Equal Regional Affiliate listing provides contact information for each affiliate's leadership as well as a listing of individuals and their companies who are part of the local leadership. Local affiliates may post upcoming networking events and recent news about their activity directly on the Out & Equal website, while a number also maintain their own sites for which one can register to be kept apprised of activities.

Seventy-three percent of corporate respondents indicate that the best way for LGBT nonprofits to start a relationship with companies is to meet and network with a company employee.



# National Gay & Lesbian Chamber of Commerce

[www.nglcc.org](http://www.nglcc.org)

The National Gay & Lesbian Chamber of Commerce (NGLCC) is the business advocate and direct link between LGBT business owners, corporations and government, representing the interests of more than 1.4 million LGBT businesses and entrepreneurs. The NGLCC is committed to forming a broad-based coalition of LGBT-owned and -friendly businesses, professionals and major corporations for the purpose of promoting economic growth and the prosperity of its members.



The NGLCC represents the interests of more than 1.4 million LGBT businesses and entrepreneurs.



As a national umbrella organization, the NGLCC is a clearinghouse of ideas and information for and between businesses and organizations. Representing 47 local and regional LGBT chambers of commerce in the United States, as well as internationally (through its sister organization, the IGLCC), NGLCC is the premier advocate for LGBT-owned businesses, professionals, students of business and corporations that seek to expand the community's financial opportunities, economic growth, continued innovation and equality.

Through its Supplier Diversity Initiative, NGLCC provides certification to LGBT businesses whose owners hold a 51 percent or greater stake in their business. The certification opens doors to lucrative private and public sector contracting opportunities at many of the world's largest corporations and some domestic government agencies.

## HIGHLIGHTS

The NGLCC website contains a wealth of information intended to help LGBT-owned businesses, employees and employers. Some of the items of interest on the NGLCC website include:

- *Supplier Diversity Initiative*, which offers businesses tools to make connections with American's top corporations and each other
- Regulations or changes that relate to small business through agencies such as the U.S. Department of Commerce and Small Business Administration
- *Community section* that contains a listing of LGBT Business Organizations by state
- Resources to help women and transgender-owned businesses



### WHY THIS IS A GOOD RESOURCE

---

We believe that the LGBT Business Organization listing of the Community section may be of particular interest to local or regional organizations. The section contains a listing, by state, of the local affiliates of the NGLCC with contact information and a link to the affiliate's website. (Note: Not all states or regions within states may have a local affiliate.)

The listing is a good resource for local organizations to identify businesses in their region with which they might be able to establish partnerships. Many of the local affiliates host regular networking meetings and other events, most of which are publicized on their websites. Such opportunities provide nonprofit professionals with the opportunity to meet business leaders in their region to talk about how they might establish mutually beneficial partnerships.



**MUTUALLY BENEFICIAL, SUSTAINABLE  
AND REWARDING PARTNERSHIPS BETWEEN  
NONPROFITS AND CORPORATIONS ARE THOSE  
THAT ARE ALIGNED IN MISSION, VISION  
AND OBJECTIVES.**

“Recent trends in corporate philanthropy have ushered in a new approach to giving, one that seeks greater collaboration among all stakeholders, taps into the tremendous desire of employees to participate through their volunteerism, and more fully leverages tools available to businesses to maximize the impact of community investment.

—Harold McGraw III  
Chairman, President, and CEO  
The McGraw-Hill Companies  
CECP Chairman<sup>1</sup>



# Effective Partnerships

## 110 Questions to Consider

There is no single question (or answer) that provides the right direction for every presentation, proposal or partnership that a nonprofit develops for a company. But there are dozens of questions for nonprofits to consider before meeting with a potential partner that might give good ideas on how to access corporate resources and build long-term relationships.

*Chapter 5: Effective Partnerships: 110 Questions to Consider* asks some of the more important questions to consider before approaching a potential company as a partner on LGBT equality. While these questions are primarily focused for those working at nonprofits, we believe corporate readers of this guide can also learn from them when considering how to build a business case internally for support of a nonprofit. The CECP website also offers a great resource for those working within corporations, “Giving Officer Quick Tips”, which is located in the Resource section of the website [www.corporatephilanthropy.org](http://www.corporatephilanthropy.org).

<sup>1</sup> CECP website: [corporatephilanthropy.org](http://corporatephilanthropy.org)

## KNOW YOUR VALUE:

Recognize, measure and respect the value of your organization and brand and the impact your work has on the world.

**ASSETS:** There are many reasons why a company might want to partner with a nonprofit focused on advancing LGBT equality. Your name and brand recognition, community presence, issue expertise, program development, and more. Understanding the unique and diverse assets that your organization may offer to a company is important to outline before approaching a potential partner.

1. What is your value proposition?
2. Are your organization's mission and values aligned with the company's values?
3. Do you have experience in developing and managing creative and strategic partnerships?
4. Does your organization have unique expertise or attributes that bring added value to the corporate partner?
5. What are the top five reasons why this company should partner with your organization?

### TIP

Build and rank a Top 5 list of your most valuable assets and biggest liabilities

**LIABILITIES:** Just as there are many reasons why a company would partner with a nonprofit focused on advancing LGBT equality, there are many reasons they might not. Your philanthropic missions are not aligned, the business case has not been made or your geographic scope is too small (or big). Before approaching a potential partner, research the possible drawbacks that your organization might represent for a company and be prepared to speak to them.

6. What are your drawbacks?
7. Is the scope of your organization too small, or too big, for a particular company?
8. What are the ways in which your organization's work does not align with the business objectives of this company?
9. What are the top five reasons companies give for not partnering with your organization?
10. What are the top five reasons why this company might not invest in your work?



## BE CREATIVE:

Push the limits of creativity and think about ways to make your partnership one-of-a-kind.

### TIPS

Be ready and available to accept skilled support. Pro bono generally is a more sophisticated contribution than traditional volunteerism, so assign staff or board members to solicit and oversee pro bono engagements in their areas of expertise.

Meet with corporate funders to discuss the top three business issues outlined in your strategic plan; ask your funders if they can identify expertise within their organizations to help address these needs.

When negotiating sponsorship contracts, think beyond the cash mentality and recognize pro bono as a currency that can garner recognition and benefits. This will underscore its value and encourage more of it.<sup>2</sup>

**CUSTOMIZATION:** Grant request forms from companies, foundations and government agencies tend to have standard formats and fields of entry. However, even within these standard formats, nonprofits have the opportunity to use language that reflects creativity and specific knowledge of the business community. Going beyond a cookie-cutter approach and tailoring terminology may increase your chances of getting corporate resources and investment.

21. Is your approach cookie-cutter?
22. Have you tailored the language in your proposal to reflect the company's mission and values rather than simply cutting and pasting language from another proposal?
23. Have you expressed your openness to exploring opportunities with this company that include both cash and non-cash resources?
24. Have you integrated specific key words and references to the corporate mission, vision and objectives of this company?
25. Do you address or reference all the different and relevant departments in the company that might have resources?

**IN-KIND:** There are many kinds of resources that a company can provide to a nonprofit, including pro bono services, product donations and institutional and operational offsets. In-kind donations can help both the company and the nonprofit avoid issues related to limited budgets. Nonprofits should think creatively about partnership opportunities that go beyond cash and make strategic use of in-kind corporate resources.

26. Have you leveraged in-kind opportunities?
27. What assets does the company have, including products, event spaces, printing facilities, etc., that you could use to offset costs in operations, programming or fundraising?

<sup>2</sup> 2009 Deloitte Volunteer IMPACT Survey, [deloitte.com/us/community](http://deloitte.com/us/community)

28. What official pro bono services does the company provide, and how could you use them to further your mission?
29. How could you leverage product donations from this company?
30. Can you show ROI from in-kind donations and help the company champion the work in an annual report?

**PARTNERSHIP:** The difference between the word *sponsorship* and *partnership* is important in the landscape of corporate philanthropy. A sponsorship implies writing checks to help pay for events, materials or programs. A partnership, on the other hand, is a more powerful word that suggests a certain equality and mutual respect in the relationship. Nonprofits and companies open to framing relationships as partnerships may grow deeper, more sustainable relationships that leverage and amplify the unique assets of both organizations.

31. Are you willing to partner?
32. Do you have the experience, knowledge and resources to dedicate to building and sustaining a relationship with this company?
33. Would you be willing to co-brand aspects of the relationship, such as an event, set of materials or program?
34. How willing are you to share the spotlight with this company?
35. What are your key learnings from past partnerships, including successes and failures?

## TIP

Find a corporate-nonprofit partnership that you respect and try to incorporate those ideas in your proposal.

# TIPS

Create a list of reasons why your idea is ownable by your partner, and be ready to talk about them.

Manage expectations at the beginning of the partnership to determine the sustainability of ownable projects and resources required to complete them.

Discuss any parameters around partnership exclusivity upfront.

**COLLABORATION:** Your willingness to work with other nonprofits, particularly others in the LGBT arena, on a proposal for a company could be a creative way to build a partnership or get corporate resources. The journey toward LGBT equality is a complicated and ever-changing landscape. A collaboration of nonprofits with a clear and aligned mission might be more interesting for a company unsure of the organizations with whom it should partner.

36. Have you explored working with other nonprofits?
37. What nonprofits, whether LGBT or not, have missions that align with yours?
38. How would these other nonprofits amplify your strengths and address your weaknesses?
39. Have you built, or worked as part of, a successful collaboration in the past?
40. Why would a collaboration of nonprofits working together be better for this company than working apart?

**OWNERSHIP:** Companies seek to differentiate themselves from their competition by creating competitive advantages. Whether attracting and keeping clients or recruiting and retaining employees, companies want to develop products, services and partnerships that stand-out from the competition. Developing a partnership with an LGBT nonprofit might be an opportunity to do just that, to create something unique for the company.

41. Is your idea ownable?
42. Who are the company's competitors and what have they done?
43. What have those competitors done on LGBT equality and other issues your organization addresses?
44. Are you proposing an idea for this company that has been done before?
45. How might your idea give a competitive advantage to this company?

**DIGITAL:** Many companies are discussing and debating how to incorporate digital platforms and strategies into their work and workplaces. Stakeholders, especially consumers, actively use text messaging, status updates, instant messaging and mobile phone applications to instantly communicate with peers and colleagues. Interactive and social media can be important tools to engage and ignite company employees, consumers and community partners around your work.

46. How have you leveraged digital platforms?
47. Are you and your organization involved in social networks (e.g., Facebook, LinkedIn, MySpace, Twitter, YouTube)?
48. Through social media, have you effectively mobilized advocates around your organization or LGBT advocacy?
49. How have you or your organization leveraged mobile platforms (e.g., PDA applications, texting, etc.)
50. Have you successfully raised money and awareness around LGBT issues via digital campaigns?

**GREEN:** Many companies have both short-term tactics and long-term strategies to address issues related to sustainability and the environment. Some corporate sustainability goals extend beyond the company and guide suppliers, partners and other organizations up and down the supply chains. LGBT nonprofits should not overlook opportunities to incorporate green into their ideas to partner with a company.

51. How green are you?
52. Do you know this company's sustainability commitments?
53. Does your organization have stated policies related to your environmental impact?
54. What are the green elements to your organization, such as energy efficiencies in the office, use of recycled paper, carbon offsets, etc.?
55. Have you incorporated any green elements in your proposal to this company?

## TIP

Use social media—like Facebook, Twitter, MySpace and LinkedIn—to find, engage, and update potential partners on your work.

## TIP

Look online for a company's corporate responsibility report or sustainability report to read about its commitments to protecting or improving the environment.

## THINK BUSINESS:

Show that you have a mind for business and that you know something about theirs.

### TIP

Look for the names of stakeholder organizations on corporate websites or in their corporate responsibility reports.

**STAKEHOLDERS:** Many companies create stakeholder maps that identify the different people, organizations and systems that impact their businesses: consumers, customers, shareholders, investors, employees, executives, community groups, and more. Identifying at least some of the most important stakeholders of a potential corporate partner will help a nonprofit proposal speak more directly to core business objectives, brand values and missions.

56. Who are the company's stakeholders?
57. Is the company public (with shareholders) or private (with investors)?
58. Is the company focused primarily on marketing to consumers or marketing to other businesses?
59. Who are the people that buy the company's products or services?
60. How does your organization or proposal align with those people?

### TIPS

Look for speeches by company executives to get an understanding of its corporate mission, brand values, giving guidelines and marketing strategies.

Network with an ERG leader or other company employee to gain insight on how best to navigate the company when seeking resources.

**CORPORATE MISSION:** Companies today are increasingly aligning their philanthropy and giving strategies to their corporate missions, business objectives and brand values. Researching a company's mission and how it connects to its giving guidelines is an important element to understanding the potential for a partnership. A proposal for partnership with a company must clearly align to the company's mission and giving guidelines.

61. What are the company's business objectives and mission?
62. What is the corporate mission statement for the parent company and/or its business units?
63. Does the company have—and publish—its own giving guidelines?
64. Does the company focus its corporate giving and investment in particular areas or on specific issues?
65. How does your organization align with or support the company's mission, giving guidelines or focus areas?



# TIPS

Check business websites, like Yahoo! Finance or Hoover's, to find calendar information about public companies, including their fiscal year.

Ask your internal champion, such as an ERG leader, about important dates on the calendar that matter to the business and could impact a partnership.

**CALENDAR:** As noted in *Chapter 3: A Guiding Glossary*, the fiscal year is important to a company for making budgetary decisions, developing products or making donations. Other dates on the corporate calendar can offer some guidance to nonprofits as to the ideas and opportunities a company might support. Nonprofits should consider how dates throughout a calendar year might guide the decisions of a company and opportunities to partner.

76. What are important dates on this company's calendar?
77. What is the fiscal year of the company, and how might it impact the budget related to your proposal?
78. If the company makes products, what is the approximate development cycle to design, build and launch the product?
79. Does the company support heritage days, weeks or months, like Pride or Diversity Awareness Month (October)?
80. Does the company create partnerships, employee award ceremonies, or other promotions around the holidays or other times of the year?

**NEWS:** The 24-hour news cycle and constant access to headlines can engage, entertain or ignite consumers on many different topics. Reading recent stories about the company, especially any related to its philanthropic work or LGBT support, is important to do before approaching a potential corporate partner.

# TIP

Check the hometown newspaper of the company's headquarters, identify the company's community partners, and look for LGBT-related news about each organization.

81. What are recent news stories about this company?
82. What are recent stories about the company, its competitors or its industry?
83. What are the recent stories related to this company's philanthropic work, diversity or LGBT-specific issues?
84. Have any of the stories been controversial? If so, how might they impact your potential partnership?
85. What are the company's most recent press releases, and do any have to do with diversity or advancing LGBT equality?





**ACKNOWLEDGMENT:** Thanking and recognizing corporate partners is a smart and necessary act of sustaining and cultivating relationships. Companies usually have guidelines around when and where their names or logos can be used or referenced in public. Nonprofits should understand those requirements at the beginning of the partnership, and then explore additional ways to recognize the company through the duration of the relationship. All opportunities for public recognition should be developed or approved by both the nonprofit and corporate partner.

- 106. How will you recognize corporate partners?
- 107. Do you have a formal recognition program for corporate partners?
- 108. Does your acknowledgement system include multiple touch points for ERG leaders, CEOs, board members, employee volunteers, etc.?
- 109. Do you use digital platforms, such as an e-newsletter, website updates or social media, to recognize your corporate partner?
- 110. Do you have any policies in place that would preclude you from publicly recognizing a corporate partner?



Thanking and recognizing corporate partners is a smart and necessary act of sustaining and cultivating relationships.





**ONE THING IS CLEAR—ALL OF THE  
COMPANIES AND NONPROFITS TOOK THE *TIME*  
TO WORK TOGETHER TO SHAPE PARTNERSHIPS  
THAT WOULD BE MUTUALLY BENEFICIAL  
AND SUSTAINABLE.**

“Today, the value of corporate involvement lies as much in expertise as it does in monetary support.

—Bill Gates  
Wall Street Journal Asia, 2008<sup>1</sup>

# Case Studies

## profiles in corporate-nonprofit collaboration

As noted throughout this guide, corporate philanthropy is rapidly changing and there is a *new way of doing business*. It requires corporations and nonprofits to engage in open and honest dialogue to shape partnerships where a company’s philanthropy is reflective of the core values that guide their business; where the nonprofit is viewed as an equal partner and remains true to its mission; where expectations and deliverables are negotiated upfront; where the company includes previously untapped non-cash resources to maximize its investment; and where the nonprofit helps the company deliver on its corporate goals.

*Chapter 6: Case Studies: Profiles in Corporate-Nonprofit Collaboration* features 10 case studies that embody the spirit of the *Business of Change*. Some are examples of relationships that have evolved beyond the typical sponsorship model into richer, more meaningful partnerships. Others illustrate the value of leveraging pro bono resources, the importance of engaging a broad range of stakeholders, or the power of one individual to catalyze a new corporate program.

One thing is clear—all of the companies and nonprofits took the *time* to work together to shape partnerships that would be mutually beneficial and sustainable. These innovative partnerships demonstrate real impact and will hopefully serve as an inspiration for your own work.

### Featured Case Studies:

- [Cardinal Health and Equality Ohio](#)
- [Credit Suisse and Lambda Legal](#)
- [Dewey & LeBoeuf and In the Life Media](#)
- [Ernst & Young and Out & Equal](#)
- [IBM and GLAAD](#)
- [Polo Ralph Lauren and Hetrick-Martin Institute](#)
- [Sara Lee and Center on Halsted](#)
- [Starcom and Lambda Legal Midwest Regional](#)
- [Time Warner and Point Foundation](#)
- [Transgender Legal Defense & Education Fund and NY Legal Community](#)

<sup>1</sup> Strategic Corporate Philanthropy. Bill Gates. Wall Street Journal Asia. May 8, 2008.





Lambda Legal Defense & Education Fund (Lambda Legal) is the oldest and largest legal organization in the LGBT civil rights movement. For over 35 years, it has been fighting to achieve full recognition of the civil rights for LGBT people and those with HIV through impact litigation, education and public policy. Headquartered in New York City, Lambda Legal maintains five regional field offices around the country.

**THE CHALLENGE**

There are many worthy causes for an institution like Credit Suisse to support but, unfortunately, limited monetary resources. The determination of which organizations to support becomes easier when multiple advantages result for all parties involved. For this reason Credit Suisse has restructured its approach to supporting nonprofit organizations from pure sponsorship to mutually beneficial annual partnerships. Rather than gala dinner-based sponsorships, Credit Suisse asks its potential partners to assess their needs and think creatively about leveraging the bank’s resources and interests. One of the most successful of these partnerships has been with Lambda Legal. The Credit Suisse-Lambda Legal partnership incorporates Lambda Legal’s donor development and educational outreach with Credit Suisse’s objectives of business development, talent recruitment, and enhancement of employee networking opportunities both within and outside of the firm.

**THE APPROACH**

Through a request for proposal process, Lambda Legal was able to take a high-level view of all the needs of its organization, which fell into three main categories:

-  **NEW DONOR DEVELOPMENT**
-  **EXISTING DONOR APPRECIATION AND CULTIVATION**
-  **EDUCATION**



Rather than gala dinner-based sponsorships, Credit Suisse asks its potential partners to assess their needs and think creatively about leveraging the bank’s resources and interests.



Based on the identified goals of Credit Suisse (business development, recruiting, community relations/volunteerism, supplier diversity, research, leadership development opportunities for employees), Lambda Legal and Credit Suisse created a partnership that resulted in the following events for 2009:

- 1 Major Donor Appreciation Event**—Through Credit Suisse’s global sponsorship of the New York Philharmonic, an evening was created for 30 Lambda Legal major donors and 20 Credit Suisse high-net worth clients. The evening included a private reception with the conductor, followed by dinner and the performance.
- 2 Lambda Legal Women’s Event**—Both Lambda Legal and Credit Suisse sought opportunities to increase outreach to the women’s community. By jointly hosting an event with Lambda Legal women donors in partnership with Credit Suisse’s Americas Women’s Network, both were able to meet each other and the goal. The event, funded by Credit Suisse, was at an exclusive venue, in New York City with more than 220 women in attendance (roughly 65 from Credit Suisse and the balance from Lambda Legal). Lara Warner, co-chair of Credit Suisse’s women’s network and Director of Credit Suisse Research, as well as Fran Goldberg, Deputy Director of Lambda Legal, were the keynote speakers.



mutual benefits are explored. Because the bridge was built on a solid foundation of good social and business returns, the participating organizations reap more than they originally imagined. Lambda Legal is not “just another cause”, it is a partner.



**Nonprofits who can put themselves in the shoes of the corporations they seek to engage significantly increase the chances of longer lasting and deeper relationships, with virtually unlimited scope for innovation. Gala dinners tend to be limiting. Typically, they have limited return-on-investment for the nonprofit with 40–60 percent of the funds raised going to overhead. For the sponsoring organization it is an expensive single evening, with few opportunities to stand out amongst competitors in the same venue. The opportunity for creative mutually beneficial partnerships is missed.”**

— Todd Sears, Director and Head of Americas Diversity and Inclusion, Credit Suisse

## Dewey & LeBoeuf LLP and In The Life Media



### PRO BONO SERVICES RELIEVE THE BUDGET

#### ORGANIZATIONS

Dewey & LeBoeuf LLP is internationally recognized for its outstanding pro bono services and was recently honored as Pro Bono Firm of the Year by the District of Columbia Bar. With diversity as the signature piece of its pro bono work, the law firm has a long history of serving the LGBT community, including its filing amicus briefs with the New York Court of Appeals and the Iowa Supreme Court on behalf of children's rights in the same-sex-marriage case in those states and with the California Supreme Court seeking to protect the rights of the 18,000 same-sex couples married before the passing of Proposition 8.

Since 1992, In The Life Media (ITLM) has been transforming public perceptions of the LGBT community. Before television shows like *Will & Grace* and *The L Word* hit the airwaves, media portrayals of the LGBT community were often one-dimensional and rarely positive. Its Emmy-nominated original program, *IN THE LIFE*, documents the full range of LGBT experiences, including politics and public policy, personal and community health, as well as religion and spirituality.

#### THE CHALLENGE

Over the course of 18 seasons, ITLM had amassed the largest collection of LGBT archived footage in the world. Considering the historical significance of such a valuable resource, ITLM needed to ensure that this information was properly preserved and made accessible not only to other members of the LGBT community but also to the general public, including scholars and filmmakers. ITLM knew that it was critical that they secure all legal rights, clearances and appropriate licenses for their growing archive, but the cost for legal fees was not something they could easily absorb into their budget. They had a relationship with a law firm that had required ITLM to pay legal fees. The challenge was to identify a law firm that would offer pro bono services to ITLM.



# Ernst & Young and Out & Equal



## FROM CHECK-WRITING TO COLLABORATION

### ORGANIZATIONS

Ernst & Young is one of the world's leading professional services organizations, helping companies across the globe identify and capitalize on business opportunities.

Out & Equal™ Workplace Advocates is the pre-eminent national organization devoted to the LGBT community in the workplace. Their mission is to educate and empower organizations, human resource professionals, Employee Resource Groups (ERGs) and individual employees through programs and services that result in equal policies, opportunities, practices and benefits in the workplace regardless of sexual orientation, gender identity, expression or characteristics.

### THE CHALLENGE

Beyond providing sponsorship dollars, Ernst & Young, like many companies, is constantly seeking ways to involve and engage its employees with nonprofit organizations. Ernst & Young and Out & Equal have joined together for a number of years primarily through sponsorship. As Ernst & Young looked at how it could uniquely leverage its talented workforce as part of an overall sponsorship package, it became necessary for each party to explore how they might be able to work differently together.

### THE APPROACH

In the midst of navigating a challenging economic environment, Out & Equal asked Ernst & Young, “What would you like to see this grow into?” The dialogue that followed was ultimately enriching for each party and specifically addressed Ernst & Young’s objective of getting more of its employees engaged in Out & Equal’s work, primarily the annual Workplace Summit, as volunteers, and through in-kind service provision.

### THE RESULTS

By proactively asking Ernst & Young how Out & Equal could help them achieve some of the objectives they sought, they opened up an entirely new dialogue that ultimately created more engagement. Ernst & Young has a strong desire to involve as many employees as possible with nonprofit opportunities to help build employee skills and networking capabilities. Ernst & Young employees support Out & Equal by improving the delivery of workshops at the Summit by staffing each workshop and ensuring they operate smoothly. With a large number of Ernst & Young employees actively engaged, there was leverage for Ernst & Young to also make a case for significant financial support of the Summit. Through further negotiation, Ernst & Young and Out & Equal were able to agree that through in-kind service and staff provision as well as the monetary support that Ernst & Young would be able to also achieve recognition at a higher sponsorship level for the Summit. Drawing on a broad range of Ernst & Young’s resources ultimately helped create a mutually beneficial partnership for both Out & Equal and Ernst & Young.



With a large number of Ernst & Young employees actively engaged, there was leverage for Ernst & Young to also make a case for significant financial support of Out & Equal’s annual Workplace Summit.



# International Business Machines (IBM) and the Gay & Lesbian Alliance Against Defamation (GLAAD)

## MOVING BEYOND SPONSORSHIP

### ORGANIZATIONS

International Business Machines Corporation (IBM), the multinational computer technology and consulting corporation, is a gold-standard model for corporate engagement with GLBT organizations. IBM was the first major company to add sexual orientation to its United States nondiscrimination policy and is also a founding member of the National Gay & Lesbian Chamber of Commerce. Big Blue, as IBM is affectionately termed because of its official corporate color, supports GLBT employee groups in 23 countries and has formed global executive-level task forces and business development teams to address the needs of GLBT employees.

The Gay & Lesbian Alliance Against Defamation (GLAAD) is dedicated to promoting and ensuring fair, accurate and inclusive representation of people and events in the media as a means of eliminating homophobia and discrimination based on gender identity and sexual orientation.

### THE CHALLENGE

Over the years, IBM had served as a sponsor of GLAAD's annual Media Awards—a multi-city gala event that recognizes and honors media for their fair, accurate and inclusive representations of the GLBT community and the issues that affect their lives. IBM wanted to continue to partner with GLAAD but was interested in moving beyond the traditional dinner/event sponsorship. IBM requested that GLAAD re-evaluate its standard approach to create a different kind of partnership—one considered to be a value-based partnership.

### THE APPROACH

Upon receiving a standard proposal from GLAAD to serve as a high level sponsor for their upcoming Media Awards, IBM responded by challenging GLAAD to consider a proposal that extended beyond this model of corporate-community engagement. IBM suggested a teleconference designed to help GLAAD understand IBM's business objectives and brainstorm potential opportunities for collaborations. IBM was especially impressed during these conversations by GLAAD's in-depth knowledge of the Latin American media landscape and GLAAD's insight on the status of corporate engagement in the Latin American GLBT movement.

A new innovative project was proposed based on this candid exchange about IBM's needs, GLAAD's capacity and what both parties needed to declare the collaboration successful. GLAAD and IBM would partner to create primary research designed to advance the work of IBM and its customers in the GLBT-corporate relations space in Latin American markets. In short, GLAAD would leverage its expertise in media to help IBM assess the environment in Latin American markets. The output of this work would inform IBM's objectives in increasing the visibility of corporate support and assist IBM corporate customers with their paths to GLBT commitment in Latin America.



IBM was the first major company to add sexual orientation to its United States nondiscrimination policy and is also a founding member of the National Gay & Lesbian Chamber of Commerce.



**THE RESULTS**

GLAAD was able to gain broader exposure to other corporations, build its value as a partner to IBM, and demonstrate that the value of GLBT diversity to business extends beyond being "the right thing to do" to offer quantifiable business benefits. Notably, IBM was able to leverage its relationship with GLAAD to gain introductions to new corporate and community partners in Latin American markets. Successful execution of the Latin America project led to a grant for a similar project focused on the global Asia Pacific GLBT communities. The partnership has also helped to enhance the business acumen of GLAAD's development staff.



**For GLBT corporate-community partnerships to be effective, the corporation has to invest time and effort along with funds. Community organizations must be knowledgeable about the broader business objectives and culture of the corporation. To innovate, corporations must also be mindful of the real unique attributes and operational challenges of community organizations."**

*—Yvette C. Burton, Ph.D., Business Development Executive, GLBT and Human Capital Management Segments, IBM Corporation*

## Polo Ralph Lauren and The Hetrick-Martin Institute, Home of the Harvey Milk High School



**MAKING A DIFFERENCE WITH MENTORING**

**ORGANIZATIONS**

Polo Ralph Lauren is a leader in the design, marketing and distribution of premium lifestyle products. For more than 30 years, Polo Ralph Lauren's reputation and distinctive image have been consistently developed across an expanding number of products, brands and international markets. The Polo Ralph Lauren Foundation supports initiatives in cancer care, education and service in underserved communities.

The Hetrick-Martin Institute is the nation's oldest and largest organization helping gay, lesbian, bisexual, transgender and questioning (LGBTQ) youth to reach their full potential. Through provision of comprehensive direct services and referrals, Hetrick-Martin seeks to foster healthy youth development. Hetrick-Martin is also home to the Harvey Milk High School, a New York City transfer public high school where at-risk youth, many of whom self-identify as LGBTQ, can learn without the threat of physical violence and emotional harm they faced in their former educational environments.

**THE CHALLENGE**

Developing at-risk youth to be effective and engaged students, and ultimately productive citizens, is a collaborative effort on the part of students, teachers and other concerned citizens, including business leaders. Without a concerted and



In this country, LGBTQ young people are three times more likely to drop out of school and two to three times more likely to commit suicide as compared to their heterosexual counterparts





# Sara Lee Foundation and Center on Halsted

## ••••• A COMPREHENSIVE PARTNERSHIP

### ORGANIZATIONS

The Chicago-based Sara Lee Foundation directs its philanthropic efforts to four primary focus areas, including providing access to nutritious food and addressing the issues of food insecurity, nutrition and healthy lifestyles.

Center on Halsted (Center) is the most comprehensive LGBT community center in the Midwest. The Center’s mission is, to serve as a catalyst for the LGBT community in a safe and nurturing environment that links and provides community resources and enriches life experiences. The Center does this through the provision of a diverse range of resources and programming which meet the cultural, emotional, social, educational and recreational needs of the LGBT community and its allies.

### THE CHALLENGE

When Center on Halsted opened its new facility in 2007, they saw a dramatic increase in the number of program participants. Of note was the increase in usage from the often marginalized and underserved LGBT youth and elder populations. A growing number of these youth and seniors, respectively, were homeless, unstably-housed or experiencing food insecurity, the lack of sustainable access to safe and nutritious food needed to lead a healthy and productive life.

### THE APPROACH

Center on Halsted programming is rooted in the understanding that community members cannot sustain long-term self-sufficiency while battling basic, acute issues such as stable housing, food insecurity, abuse and neglect, isolation, mental health issues or low educational attainment. As such, Center programs and services have become integrated to provide holistic wrap-around services to community members. Recognizing the challenges LGBT youth and elderly may have accessing healthy and adequate meals, the Center designed the *Access to Nutrition* program to target the issue of food insecurity among these at-risk populations. The *Access to Nutrition* program goals are to provide youth and seniors with:

- 1 The skills and knowledge required to prepare nutritious meals
- 2 Access to food
- 3 Knowledge of complementary activities that maximize the impact of healthy eating
- 4 Skills that are transferrable to the job market and lead to a career path

•••••  
 The Center on Halsted recognized that proper nutrition is now a primary focus area for the Sara Lee Foundation, and Center staff worked with partners at Sara Lee to obtain funding for this vital program.  
 •••••



# Starcom and Lambda Legal Midwest Regional Office

## MAKING THE CASE FOR DEEPER CONNECTIONS

### ORGANIZATIONS

Starcom is a full-service media agency with world-renowned expertise in making connections between consumers and brands through communications strategy, media buying and consumer research. In pursuit of helping marketers get the right consumers' attention, Starcom activates integrated campaign management, response media, digital communications, multicultural services, branded entertainment, mobile contact, social networking, sponsorships and beyond.

Lambda Legal Defense & Education Fund (Lambda Legal) is the oldest and largest legal organization in the LGBT civil rights movement. For over 35 years, it has been fighting to achieve full recognition of the civil rights for LGBT people and those with HIV through impact litigation, education and public policy. Headquartered in New York City, Lambda Legal maintains five regional field offices around the country.

### THE CHALLENGE

Lambda Legal's Midwest Regional Office (MRO), located in Chicago, has staff dedicated to its work in the region, focused primarily on programmatic and fundraising responsibilities to sustain and further the organization's work. While some marketing resources exist across Lambda's national office, the scope of their focus spans education and public information, in addition to connecting the public with the Lambda brand identity and managing digital advertising activities. At the local level, there existed a distinct need for communications specialization to support of Chicago-centric activities and community expansion.

### THE APPROACH

Lambda Legal's MRO identified a volunteer partner at advertising agency Leo Burnett to handle invitation design, creating messaging for Chicago events that told the organization's story in compelling ways. As the volunteer became more engaged in and fulfilled by the cause, his efforts generated interest among others within his corporate family—particularly volunteers from the LGBT affinity group at sister agency and leading media services agency Starcom USA. These new volunteers, already focused on elevating the profile of LGBT audiences at their agency, had expertise in a variety of other communications disciplines, including strategy, research, PR and digital media.

The new, additional value added to Lambda Legal's MRO efforts was exceptional, beginning with collaboration on online and in-person marketing efforts around Chicago Pride and Market Days events. What began as a meaningful project-based event support has blossomed into a mutually beneficial, long-term relationship for Lambda Legal and Starcom. The group of employee volunteers from Starcom worked with agency management to formalize the pro bono relationship with Lambda Legal via a one-year contract that clearly detailed each party's expectations and highlighted the responsibilities, objectives and expected deliverables from the partnership.

Today, participation in the partnership with Lambda Legal is a highly sought after opportunity for Starcom employees.



**THE RESULTS**

Time Warner became the first corporate supporter of the Point Foundation’s named scholarship program and has now made two consecutive multi-year grant commitments—each grant funds three Point Scholars. In addition, HBO, a division of Time Warner, has also become a participant in the named scholarship program, and both Time Warner and HBO have provided summer internships for their respective named scholars as well as cash and in-kind support for other Point Foundation initiatives. The Time Warner family of companies is also well represented in leadership roles on the governing bodies of Point Foundation at the local and national Board levels, deepening the relationship. Although originally turned down by Time Warner, Point Foundation did not give up, but instead did their due diligence to find where Point Foundation and Time Warner shared common goals and ultimately secured Time Warner’s funding.

**Transgender Legal Defense & Education Fund (TLDEF) and More Than 20 Law Firms**

**LEVERAGING PRO BONO LEGAL SERVICES**

**ORGANIZATION**

Transgender Legal Defense & Education Fund (TLDEF) is committed to ending discrimination based upon gender identity and expression with a mission to achieve equality for transgender people through public education, test-case litigation, direct legal services, community organizing and public policy efforts. Their in-house legal program brings test-case litigation with wide impact in all areas of transgender rights.

**THE CHALLENGE**

For many transgender people, a legal name change is a first step towards conforming their legal identities to the way they identify and live their lives. But securing a legal name change can be an intimidating experience, involving interaction with the court system and judges who can be unfamiliar with the process. It can also involve significant expense and serious commitment of time and effort.

The Transgender Legal Defense & Education Fund knew that many transgender people would benefit from legal assistance during the name change process, but they simply did not have the resources to provide legal assistance to everyone who needed help. In order to meet the community’s needs, TLDEF created the *Name Change Project*, which harnesses the private Bar’s resources for the transgender community’s benefit.

**THE APPROACH**

TLDEF was already familiar with the needs of the transgender community—competent and respectful legal services to help with the name change process. But because TLDEF sought long-term partnerships with law firms that would benefit the community, the organization recognized that they needed to create a



For many transgender people, a legal name change is a first step towards conforming their legal identities to the way they identify and live their lives.



project that met the needs not only of the community members they served but also of the law firms that they hoped would become their partners.

The result is a project that trains lawyers to provide pro bono legal services to transgender community members. It meets the firms’ needs for attorney training and development through the provision of these services and allows them also to meet their pro bono goals, while strengthening their diversity initiatives through engagement with the LGBT community. The program does all of this in a structured way, with TLDEF providing training, screening all community members before matching them with lawyers, and providing consistent support to the lawyers throughout their participation in the project.



The project has served more than 300 community members through partnerships with 20 of New York City’s most prestigious law firms and over 150 of their lawyers.



**THE RESULTS**

Community members love their interactions with the pro bono lawyers, and the lawyers love the client contact and the chance to make a measurable difference in people’s lives. Two years ago, TLDEF started the project with three lawyers at one law firm. Today, the project has served more than 300 community members through partnerships with 20 of New York City’s most prestigious law firms and over 150 of their lawyers. TLDEF has been able to run the program with the equivalent of one full-time employee and a current annual investment of approximately \$75,000. Annually, TLDEF partner law firms donate legal services valued at approximately \$1,500,000 or more.



**If we could match every dollar we spend with a \$20 match, we’d be ecstatic! And beyond the confines of the project, our partner law firms and lawyers have taken a keen interest in an underserved segment of the LGBT community. Only good things will come from that!”**

—Michael Silverman, Executive Director, Transgender Legal Defense & Education Fund

The Name Change Project is made possible by the generous financial and in-kind support of:

- |  |   |
|--|---|
| Cadwalader, Wickersham & Taft LLP            | The Morrison & Foerster Foundation                    |
| Cahill Gordon & Reindel LLP                  | Morrison & Foerster LLP                               |
| Cleary, Gottlieb, Steen & Hamilton LLP       | The Paul Rapoport Foundation                          |
| Davis Polk & Wardwell                        | Proskauer Rose LLP                                    |
| Davis Wright Tremaine LLP                    | Ropes & Gray LLP                                      |
| Debevoise & Plimpton LLP                     | Shearman & Sterling LLP                               |
| DLA Piper                                    | Skadden, Arps, Slate, Meagher & Flom LLP & Affiliates |
| Fried, Frank, Harris, Shriver & Jacobson LLP | Steptoe & Johnson LLP                                 |
| Gibson, Dunn & Crutcher LLP                  | Stroock & Stroock & Lavan LLP                         |
| The Hollyfield Foundation                    | Sullivan & Cromwell LLP                               |
| Howrey LLP                                   | Weil, Gotshal & Manges LLP                            |
|  | White & Case LLP                                      |

# Bibliography

- Businesses Buckle Up. Noelle Barton and Ian Wilhelm. *Chronicle of Philanthropy*, July 2009.
- Business's Social Contract: Capturing the Corporate Philanthropy Opportunity. McKinsey & Co. at CECP. 2008.
- CECP Board of Boards CEO Conference Executive Report. CECP. 2009.
- CECP Board of Boards, The CEO's Challenge: Leading the Company Shaping Society, February, 2008
- CECP website: [corporatephilanthropy.org](http://corporatephilanthropy.org)
- Challenges in Multiple Cross-Sector Partnerships. Kathy Babiak, Lucie Thibault. *Nonprofit and Voluntary Sector Quarterly*. February 2009.
- Concepts and Definitions of CSR and Corporate Sustainability: Between Agency and Communion. Marcel Van Marrewijk. *Journal of Business Ethics*. 2003.
- Conscious Consumer Report, BBMG, 2009.
- Corporate Giving is Moving into a New Age. LBG Research Institute. 2009.
- Corporate Philanthropy: What Is the Strategy? Jerry D. Marx. *Nonprofit and Voluntary Sector Quarterly*. 1999.
- Corporate Social Responsibility. DiversityInc. November/December 2007.
- Corporate Social Responsibility and Financial Performance: Correlation or Misspecification? Abigail McWilliams and Donald Siegel. *Strategic Management Journal*. 2000.
- Corporate Social Responsibility Through an Economic Lens. Forest L. Reinhardt, Robert N. Stavins and Richard H. K. Vietor. *Review of Environmental Economics and Policy*. Summer 2008.
- Deloitte Volunteer IMPACT Survey. Deloitte. 2009.
- Exploring Corporate Philanthropy. CECP. 2006.
- Facilitators & Bottlenecks of Corporate Social Responsibility. N.K. Chaudhary. *The Indian Journal of Industrial Relations*. January 2009.
- Focus on: Is This the Time for Companies to Be Philanthropic?. *Strategic Philanthropy, Ltd*, October 2008.
- From Spare Change to Real Change. Rosabeth Moss Kanter. *Harvard Business Review*. May/June 1999.
- Giving USA 2009. Giving USA Foundation and the Center on Philanthropy at Indiana University. 2009.
- Globalreporting.org. Retrieved October 2009.
- Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer. Jim Collins.
- Green and the Recession: It's Different This Time. GFK Roper Reports. July 30, 2009.
- Harvard Business Review*. May/June 1986.
- How Today's Corporate Donors Want Their Gifts to Help the Bottom Line. *Stanford Social Innovation Review*. 2005.
- IBM 2nd Annual Global Corporate Social Responsibility Survey. IBM. June 2009.
- Keynote Speech at Out & Equal Workplace Summit, Sharon Allen, Chairman of the Board, Deloitte, LLP. October 2009.
- Learning from Performance Measurements: Investing in What Works. *Root Cause*. 2008.
- Lobbying for Good. Kyle Peterson & Marc Pfitzer. *Stanford Social Innovation Review*. Winter 2009.
- Making the Most of a Wave of Volunteers. Aaron Hurst. *The Chronicle of Philanthropy*. June 2009.
- Massachusetts: Committed to Diversity. DiversityInc. March 2008.
- Murphy Oil and the El Dorado Promise: A Case of Strategic Philanthropy. Nancy E. Landrum. *Journal of Business Inquiry*. 2008.
- National Philanthropy Benchmark Study. Council on Foundations & Walker Information. 2002.
- President Obama to Request \$50 Million to Identify and Expand Effective, Innovative Non-Profits. [Whitehouse.gov](http://Whitehouse.gov). May 5, 2009.
- Pro Bono Strategic Consulting: The \$1.5 Billion Opportunity. James W. Shepard, Jr. and Alethea Hannemann. Taproot Foundation. 2008.
- Rediscovering Social Innovation. *Stanford Social Innovation Review*. Fall 2008.
- Social Enterprise Newsletter. Harvard Business School. Spring 2003.
- Stanford Center for Social Innovation. [www.csi.gsb.stanford.edu](http://www.csi.gsb.stanford.edu). Retrieved October 2009.
- Strategic Corporate Philanthropy. Bill Gates. *Wall Street Journal Asia*. May 8, 2008.
- Strategic Corporate Philanthropy: Addressing Frontline Talent Needs Through Educational Giving. Joe M. Ricks and Jacqueline A. Williams. *Journal of Business Ethics*. August, 2005.
- Strategy for Sustainability: A Business Manifesto. Adam Werbach. Harvard Press. 2009.
- Supply Chain Network Economics: Dynamics of Prices, Flows and Profits. Anna Nagurney. Edward Elgar Publishing. 2006.
- The Competitive Advantage of Corporate Philanthropy. Michael E. Porter and Mark R. Kramer. *Harvard Business Review*. December 2002.
- The (Not So) New Corporate Social Responsibility: An Empirical Perspective. Paul R. Portney. *Review of Environmental Economics and Policy*. Summer 2008.
- The Philanthropic Initiative Releases Corporate Philanthropy and Social Responsibility Research. CSRwire. June 2009.
- The Role of Strategic Philanthropy in Marketing Strategy. Debbie Thorne McAlister and Linda Ferrell. *European Journal of Marketing*. 2002.
- The State of San Francisco Nonprofits. Maureen Futtner. *SF Nonprofit Business Examiner*. June 2009.
- Wikipedia, the free encyclopedia. Retrieved September–October, 2009.
- Working Report on Social Responsibility. ISO Advisory Group on Social Responsibility. April 30, 2004.





business of  
change