



Changing Lives

Building a Corporate Philanthropy Program

How a client's "culture of focus" shaped the corporate giving program

THE PROBLEM

Many corporations offer an employee matching gift program. Traditionally, a company matches dollar-for-dollar up to a set amount per year to eligible organizations. Eligible organizations typically need nothing more than 501(c)3 status. However, this "portfolio approach" did not appeal to our client. In the client's world of private equity investments, "over-diversification" delivers average results.

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This is why their company invests large amounts in only a few carefully-researched options. Therefore, they wanted their corporate giving to employ the company's philosophy of delivering superior performance through focus too.

THE COMPANY

To create a focused corporate giving program, the executive committee needed to limit the eligible organizations. Based on Excellence in Giving's advice, they decided to select three locally based organizations using a two-step process. First, the executive committee would review a list of ten recommended organizations prepared by Excellence in Giving. Second, the employees would vote for three organizations from a reduced list of six.

The executive committee asked Excellence in Giving to create a recommended list of potential charitable partners using the following goals for their giving program to:

1. Encourage giving and volunteering,
2. Serve those in desperate situations such as extreme poverty or crisis, and
3. Support organizations ignored by corporate sponsorships.

Excellence in Giving used these corporate goals to screen dozens of organizations based on their purpose, results and use of volunteers. Excellence in Giving then performed additional analyses of each organization's leadership, finances and future plans. They proposed a list of organizations to the executive committee who in turn narrowed the field to two organizations in each of the following focus areas: (a) inner city youth, (b) extreme urban poverty and (c) international relief and development.

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EMPLOYEE PARTICIPATION

All employees were invited to attend two lunch-time briefing sessions designed to introduce the six potential Charitable Partners. The executive leadership even hired temporary help so that the receptionist could attend to encourage a full-team decision. Each organization presented their respective programs in a 25-minute time period. Excellence in Giving directed the organizations to include a video about their mission and end with Q & A to more fully engage the employees.

Following the presentations, employees completed a confidential online survey to vote for their preferred organization in each of the three focus areas. Excellence in Giving gathered the data and informed the executive committee of the results. The three selected organizations have now become the company's Charitable Partners. Through the selection process, the employees were educated by the non-profits and in turn developed a sense of ownership and confidence in their giving.

To further encourage employee involvement, the company offers a two-for-one match for the first \$2,000 given per employee. One matching dollar comes from the company and the other matching dollar comes from the executive leadership.

The employees are also given two PTO days per year to participate in service projects with the selected organizations. These policies demonstrate the executive leadership's belief in the importance of giving.

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The executive committee wanted their corporate giving to employ the company's philosophy and involve its employees. Excellence in Giving made that possible.

Contact Excellence in Giving at (719) 329-1515 or visit ExcellenceinGiving.com to learn how you can shape your corporate giving program.