

# Strategic, Integrated & Employee-Driven Philanthropy

## I. Developing and Managing A Strategic Philanthropic Plan

### A. Building Blocks

#### 1. Efforts are focused on projects/causes that promise a strategic payback

- The objective is motivating desired participant behavior, not just “gaining awareness” for the organization or its social consciousness.
- Long-term, focused commitment demonstrates genuine concern and is able to generate measurable impact.
- Donors and donees work together to establish and outline expectations – revisiting on a scheduled time frame as the relationship grows.

#### 2. All philanthropy is coordinated: donations, gifts-in-kind, volunteers

- Organizations/causes to be assisted are evaluated to determine which type of support will be *mutually rewarding*.

### **3. Employees drive the programs**

- Utilize a cross-section of all employees via committees who chose and select activities to be undertaken.
- Employees are active participants in the project itself; thus, increasing employee morale and organization loyalty.

### **4. Getting credit, tho with modesty, is a must**

- A formal list of what each party will do to inform key publics & opinion leaders of their partnership is an approach gaining support.
- Donor's approach is not to brag about helping, but the more effective tactic of announcing the philanthropy by "*calling attention to this important community program.*"
- Educate your audiences about your organization's philanthropic involvement.

## **B. Tumbling Blocks**

1. Supporting the boss' pet charity is out – unless the employee committees underscore its value.
2. Traditional grant making is out – too much bureaucracy & rules.
3. Appealing to the masses & ignoring the Opinion Leaders is out -- Management has a peer role that must be understood & built in.

## C. Stumbling Blocks

1. Ignoring the organization's mission/vision – does this partnership enhance or plasticize an organization's true values?
2. Focusing may mean cutting off longtime donees -- every good cause cannot be assisted every year.
  - Solution: Form an alumni association of all who have been helped – keeping relationships alive.
3. Not accepting ownership – avoiding partnerships.
  - Insight: Owned projects return more value.
  - **The donation that stops with writing the check shortchanges both donor & donee.**

## II. Beyond Financial Donations

A. Link the natural fit of philanthropy (a.k.a., social responsibility) to volunteerism, in-kind contributions or expert assistance

- Research a program's goals and strategy -- advising them in the right direction creates a mutually rewarding relationship between donee and donor.
- Utilize employees and their resources.

B. Tie community relations and employee relations into the plan

- Levi Strauss uses Community Involvement Teams (CITs) – Volunteering is ingrained in its company culture.

### III. Measurement & Evaluation of Your Organization's Plan

- A. Measure your organization's strategic philanthropic success by surveying stakeholder awareness -- studies link an organization's social awareness to buying or supporting that organizations goals/products/issues.
  
- B. Link and evaluate the goals of strategic philanthropic success to employee morale – and shareholder value.
  
- C. Gauge the effectiveness of your endeavors – organizational philanthropic goals must be motivated to be more than marketing or sales schemes – there must be a **genuine desire to do good**.

