

# LESSONS LEARNED FROM A CORPORATE DONOR



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**Florida Blue**  
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# Overview

**Overview of Corporate Philanthropy**

**Overview of Florida Blue Corporate and Foundation Giving**

**Insights into Corporate Grants and Contributions**

**Insights into Corporate Sponsorships**

**Philanthropic Resources**



# Overview of Corporate Philanthropy

## Cash Donations

- Grants (i.e., corporate contributions, foundation giving)
- Sponsorships (i.e., fundraising events, capital campaigns, etc.)
- Mission Related Investments (e.g., zero-/low-interest loans)

## Employees

- Volunteerism (dollars-for-doers, skills-based)
- Workplace giving (matching gifts, employee assistance funds)
- Board service

## Product Donations (e.g., medications, equipment, food, etc.)

## In-kind Gifts (e.g., used furniture/equipment, printing, office space, etc.)



## Corporate Giving: Growth, Innovation, CSR

- **Corporate Social Responsibility Propels Performance**
- **Measurement & Evaluation are on the rise**
- **Company Skills are being applied to solving societal challenges, Pro Bono service growing**
- **Doing good beyond giving is growing; Company-wide Day of Service voted most successful volunteer program**

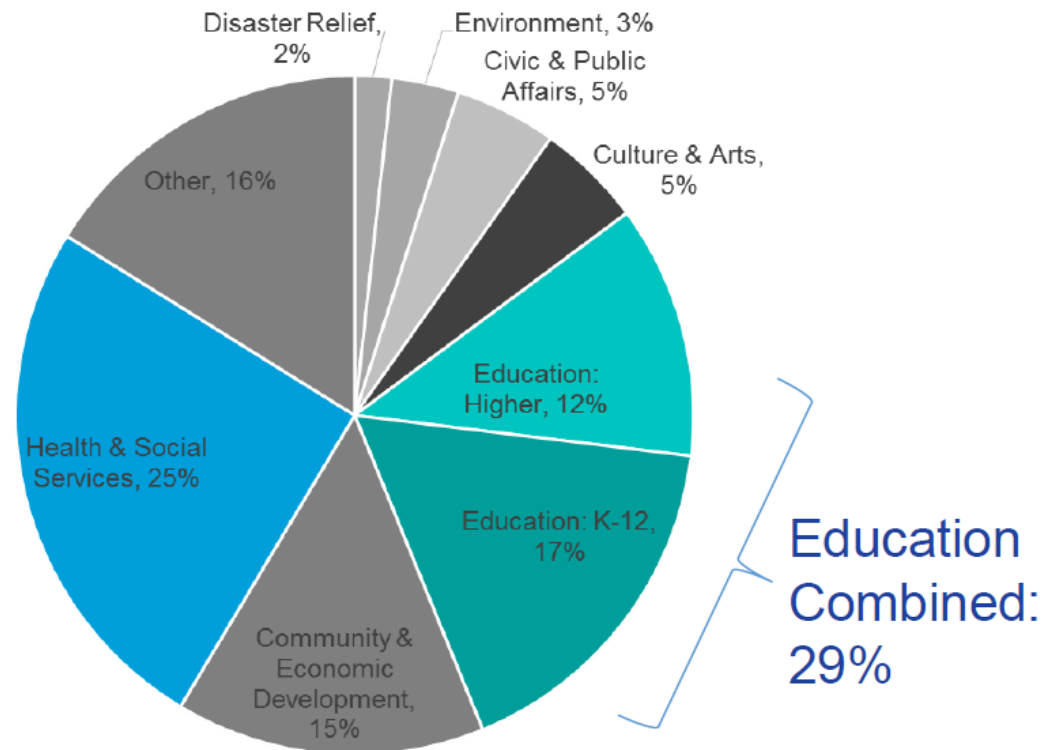


## Making the Business Case: 2015



### Education Leads Health & Social Services by 4 Percentage Points

**“Typical”  
2014 Total  
Giving  
Portfolio  
Broken  
Down by  
Program  
Area**



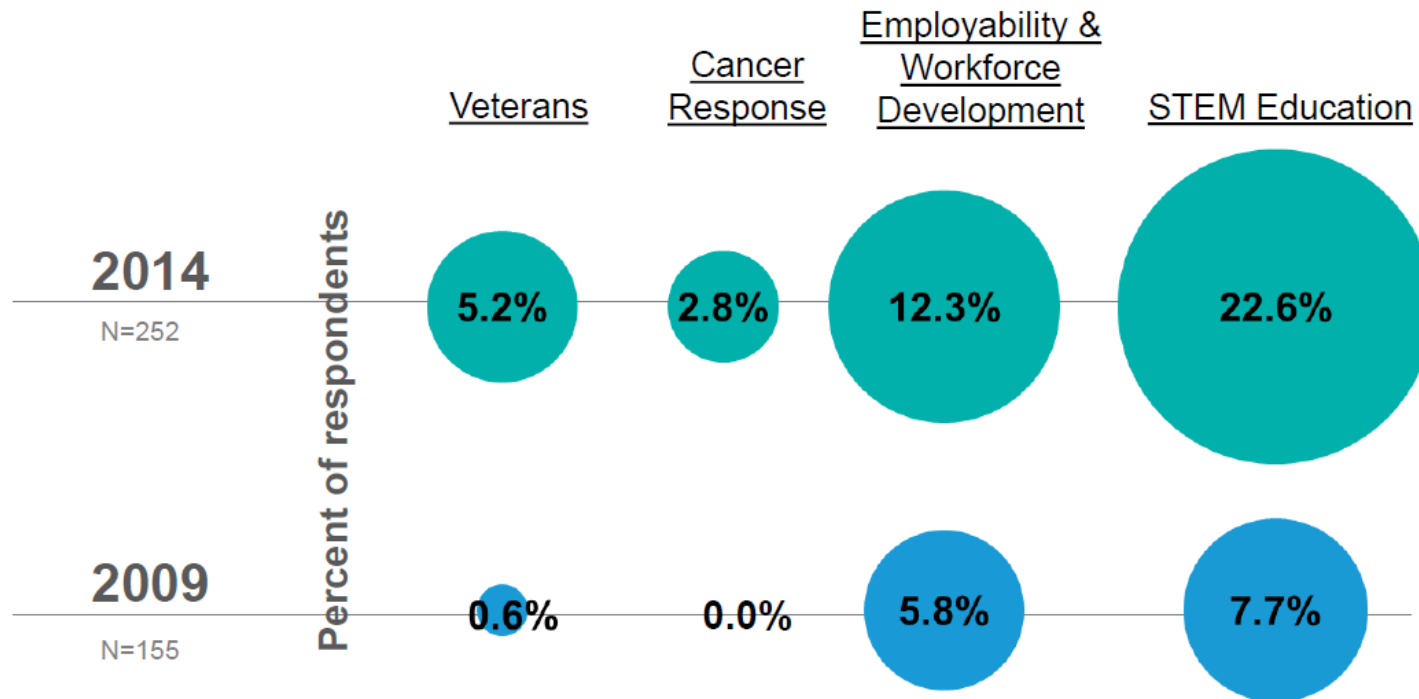
Note: 2014 Data, Average Percentages, N=208



## Making the Business Case: 2015



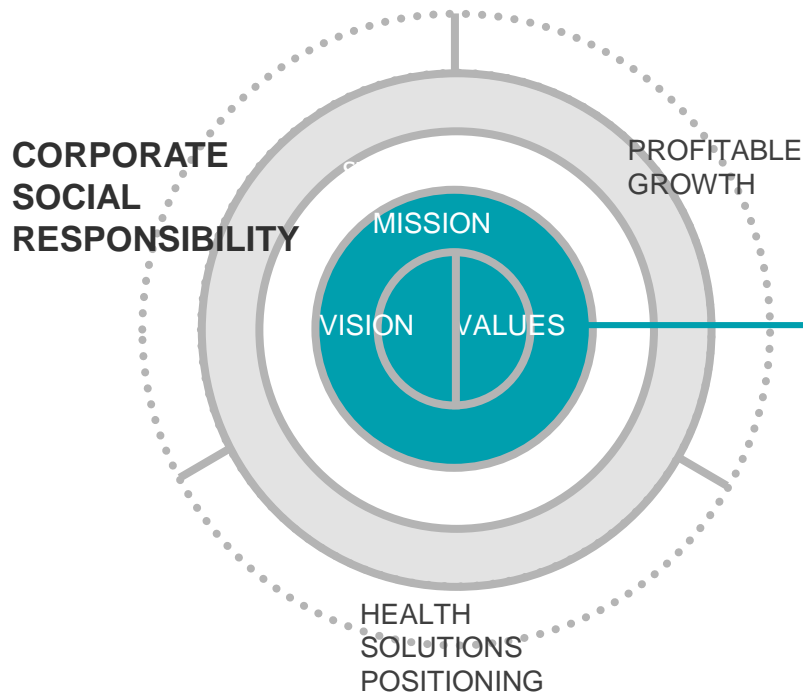
### Focus Areas Are Driven By Company Needs, Competencies, and Community Priorities



Note: Percentage reflects number of companies that listed the focus area in one year divided by total companies that responded to the focus area question in that same year.



# Corporate Social Responsibility: Mission Critical



- Advances our community-driven mission
- Differentiates the Enterprise from competitors
- Builds stakeholder trust and confidence
- Engages our workforce and increases organizational effectiveness
- Influences public policy and legislation/regulation
- Mitigates reputation risk
- Addresses critical business issues



# Corporate Philanthropy Program



- Corporate Contributions
    - Events and sponsorships
    - Build healthy, strong communities
  - Employee Engagement
    - Florida Blue Volunteers
    - United Way campaign
  - BluePartners Community Investment Program
    - Sales Reward Budget
- 
- Advance innovation/promote solutions in the health care system – RFP in 2015
  - Improve consumer health with focus on healthy lifestyles – 2016 new program
  - Improve quality and safety of patient care – nursing
  - Build healthy, strong communities (BHSC) –statewide
  - Annual Sapphire Awards and Symposium – 10<sup>th</sup> year





# Corporate Giving: Contributions and Grants

## Strategically-Focused

- Alignment with business goals and objectives (business case)
- Signature programs on the rise

## Metrics are King

- Measurement and evaluation is driving decision making
- Logic models becoming commonplace (goals, objectives, measures, etc.)
- Evidence-based interventions vs. recreating the wheel
- Goals need to be realistic and achievable (big numbers don't impress)

## Electronic Applications

- Need to be concise when completing applications (word limits)
- Answer the questions completely – don't simply cut-n-paste from website

## RFPs vs. Collaborative Approach



# Corporate Giving: Contributions and Grants

## Sustainability-Focused

- Diversified income streams (types and sources)

## Community Partnerships / Collaborations

- Strength in numbers
- Greater efficiencies / avoid duplicative efforts

## Recognition

- Saying thank you in a meaningful, personal way
- No plaques or acrylic trophies!

## Multi-Year Agreements vs. Multi-Year Relationships

## No “Recommended Amount”

- Most companies look to fund solid proposals versus affordable ideas



# Corporate Giving: Insights

## Know and Understand What You're Applying For

- Read grant/contributions guidelines carefully

## Avoid Guesswork and Assumptions

- Avoid lofty language
- Provide comprehensive, as well as concise, responses
- Staff turnover, background, knowledge and capabilities

## Grantwriter-Program Manager Agreement

- No grant application should be submitted without program staff buy-in

**WHO** is going to do **WHAT** for/to **WHOM**, **WHY**, **HOW** will they benefit, and **HOW MUCH** will it cost



# Corporate Sponsorships: Events

## Who

- Attendees (demographics: who, how many, what do you know about them)
- Sponsors
- Honorees
- Event Chair
- Employee / Executive Involvement (from your own company)

## What

- Purpose / Beneficiary (why are you holding the event)
- Benefits (e.g., tickets, advertising, signage, booths, speaking opportunity)

## Where and When

## How (Much)

- Charitable vs. Non-charitable/Taxable Values



# Corporate Sponsorships: Insights

**Keep it Simple – Stick to the Facts – Avoid Storytelling**

**Provide Sufficient Notice** (3 – 6 months)

## **Value-added Benefits**

- Earned and social media (i.e., hits, awareness, retail value, etc.)
- Signage (i.e., website, newsletter, etc.)
- Special recognition (i.e., speaking opportunities, private receptions, etc.)
- Employee engagement / volunteer opportunities
- Strategic assigned seating

## **Sponsorship vs. Grant + Tickets**

- Corporations are shifting away from charitable sponsorships
- Difficult to get employees to attend
- Difficult to measure return on investment (ROI)



# Corporate Philanthropy: General Insights

## Why Companies Choose to Give Varies

- Right thing to do
- Mission-related
- Employee engagement
- Business benefits (enhance brand/image/reputation, market access, etc.)
- CEO / Leadership mandate

## Get to Know Your Corporate Partners

- Cultivate them like you would individual donors (make it personal)
- Provide them with a “wish list” of needs/opportunities – let them pick and choose
- Don’t be a stranger (send update, share results)

## It’s Not About Your Organization, Cause or Clients

- How can your organization help corporate funders achieve their goals

## Results Matter



# Resources

Nonprofit Center of Northeast Florida  
[www.nonprofitctr.org](http://www.nonprofitctr.org)

Hands On Jacksonville  
[www.handsonjacksonville.org](http://www.handsonjacksonville.org)

Community Foundation of  
Northeast Florida  
<https://www.jaxcf.org>

Florida Nonprofit Alliance  
[www.flnonprofits.org](http://www.flnonprofits.org)

Association of Fundraising  
Professionals  
[www.afpnet.org](http://www.afpnet.org)

Foundation Center  
[www.foundationcenter.org](http://www.foundationcenter.org)

United Way of Northeast Florida  
[www.unitedwaynefl.org](http://www.unitedwaynefl.org)



# Conclusion

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