

WINGS Internship Program

**CORPORATE PHILANTHROPY AND COMMUNICATION STRATEGIES
IN SOUTH FLORIDA, U.S.A.**

Sending Organization: Grupo de Fundaciones (GDF)
Ciudad Autonoma de Buenos Aires, Argentina

Name of Intern: Elizabeth V. Simone
Coordinator of GDF's Communication Activities

Host Organization: Donors Forum of South Florida
Miami, Florida, USA

Supervisor/ Mentor(s): Jo Anne Chester Bander, *President and CEO*
Kim Winch, *Director of Programs and Member Services*

Duration/Schedule: 2 weeks, May 29 – June 12, 2002

Program Focus: Corporate Philanthropy and Communication Strategies

SCHEDULE

May 29

Meeting at Royal Caribbean with:
Lynn Martenstein
*Vice President – Corporate
Communications*

May 30

Youth Development Seminar – Donors
Forum

Meetings at United Way with:
Tamara Klingler
Senior Vice President – Public Relations
Tavia Robb
Senior Manager – Public Relations
Blanca Silva
Director – Media Relations

May 31

2002 Goals Conference – Greater Miami
Chamber of Commerce

June 4

Education Choices Seminar – Donors Forum

Meeting at Donors Forum with:
Katherine M. Eggleston
*Vice President – Corporate
Communications (JM Family)*

June 5

Meetings at Knight Foundation with:
Yves Colon
Journalism Initiatives Program Officer
Jorge Martinez
Director of Information Systems
Philip Francis
*Information Technology Associate
Web Technician / Project Manager*
Larry Meyer
Vice President of Communications
Robbie Adams
Yvette Sterbank

June 6

Meeting at Citrix Systems with:
Jo Moskowitz
Internal Communications and Public Affairs

June 7

Meeting at Collins Center with:
Tanya Dawkins
Senior Vice President

Meetings at Miami Herald with:
Maria Flores
El Nuevo Herald Promotion Manager
Lucy Espinel
Community Relations
Nohemi Alarcon
*Broadcast Producer/Community
Representative*
Robin Reiter-Faragalli
Vice President Human Resources
Jeordan Legon
Managing Editor

June 10

Meetings at Dade Community Foundation
with:
Ruth Shack
President and CEO
Eddy Lopez-Robledo
Communication Associate
Joe Pena
*Director of Development and
Communications*

June 11

Breakfast with Mayor Díaz
Meeting at Bank of America with:
Obdulio Piedra
*Senior Vice President – Community
Relations Manager*

June 12

Meeting with Scot Marken – Coalescence
President

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CORPORATE PHILANTHROPY AND COMMUNICATION STRATEGIES IN SOUTH FLORIDA, U.S.A.

1 INTRODUCTION

During my internship at the Donors Forum of South Florida, I met several people from different organizations, which allowed me to learn how associations of grantmakers and foundations work with the community, the media, the government and NGOs. I was able to analyze their communication strategies, goals and issues, and I learned about the development of corporate philanthropy in the United States. In this report, I want to describe briefly the things I found most important in interviews and meetings, including related best practices.

2 SOUTH FLORIDA DONORS

The grantmaking sector in South Florida includes 1,225 foundations — private, independent, community, family, and corporate foundations; public charities; corporate grantmaking programs; and professional advisor programs — and invests \$9.2 billion every year in projects related to health, education, children, art and culture.

The Donors Forum of South Florida (DF) includes more than 120 of these organizations. Their aim is “to expand philanthropic resources, control the quality of philanthropy, create a spirit of communication and cooperation among corporations, foundations, individuals and their advisors and to enhance the ability of members to fulfill their charitable goals or purposes in their work with nonprofit and other key sectors.”

In order to promote philanthropy, the DF organizes weekly meetings with members from different grantmaking organizations. They analyze common matters, exchange experiences, share relevant investigations on local problems that serve as starting points for new initiatives in the sector, and organize workshops for specialists and academics and meetings with government authorities. In addition, the DF offers a lot of key information on local philanthropy, making it a

link for companies, the government, the media, NGOs and the community to obtain contacts, sources, projects, statistics and quality information from the donors' sector.

3 CORPORATE PHILANTHROPY

Corporate philanthropy in South Florida demonstrates three characteristics clearly depicted when interviewing those involved in the planning, fulfillment and follow-up of programs carried out by companies and other social sectors.

- 1) Projects focused on a community.
- 2) The concept of helping others includes the value of diversity.
- 3) The grant includes the commitment and hours of voluntary work of directors and employees of the company.

3.1 LOOKING AT THE COMMUNITY

One common characteristic among funders in South Florida is their interest in supporting the community as a whole instead of helping in isolation or individually. Focusing the grant allows them to know the necessities that a sector of society may have, identify areas of work, community leaders and NGOs that carry out research, work in different sectors and coordinate programs and projects.

3.2 DIVERSITY: STRONG VALUES

There is an interest to provide initiatives that may include all sectors of society. For this reason their objectives start from the concept of diversity that includes the different communities that live together in the United States —Hispanic, African, Asian, etc.

3.3 THE COMPANY AND THE EMPLOYEES WORK TOGETHER FOR THE COMMUNITY

All the information gathered — anecdotes, pictures and articles — show in a way the value of a social project and the level of commitment within the community that employees have from those companies promoting philanthropy. The company gives working hours to allow their

employees, without taking into account positions, to develop voluntary activities for the community. In some cases employees themselves offer economic help.

Royal Caribbean International and Celebrity Cruises

With an annual budget of \$5,070,000 this company, specialized in cruises, develops 12 projects in different communities in Florida, the Caribbean, the west coast and Alaska. Every year its 25,000 employees are called to work for a whole day for the community (called "GIVE DAY"). As a result of this event, new volunteers appear who decide to join some of the projects in progress in the different communities. The company then organizes special meetings with its employees and shows videos and pictures from the different initiatives carried out. All the material is sent to the media and is published in the company magazine.

Bank of America

The Bank of America Foundation operates with the largest philanthropic budget of any financial institution in the United States and is ranked one of the nation's top five largest corporate contributors. These numbers show something more — the volunteer spirit and network is very important in the culture of the Bank.

This value is transmitted through five programs carried out by companies to promote the social compromise among its employees and those from nonprofit organizations:

- 1) Volunteer time for schools: The Bank's Volunteer Time for Schools program gives every full-time associate the opportunity to spend up to two hours a week of paid time volunteering in a public or private school.
- 2) Volunteer Grants Program: If an associate volunteers at least 50 hours at a nonprofit organization during a calendar year, Bank of America donates \$250 to that organization in the associate's name. For those who volunteer 100 hours or more, the donation is \$500.
- 3) Matching Gifts Program: The foundation also matches the donations Bank of America associates make to nonprofit groups. Every gift, from \$25 to \$5,000, is matched dollar for dollar.
- 4) Team Bank of America Volunteer Network: This team was created to provide associates with an outlet for their volunteer spirit.

- 5) Joe Martin Scholarships: Students who are current, retired or deceased Bank of America associates' dependants receive scholarship ranging from \$500 to \$5,000 to pursue higher education at a college or vocational school.

Moreover, once a year Bank of America organizes an internal campaign supporting United Way where employees grant approximately 1% of their salaries. Apart from this campaign, the foundation grants part of its budget to the United Way.

Citrix Systems

The company, dedicated to application server software, has 1.800 employees. All are young, with a lot of energy, and have been educated in the context of the new technologies. Apart from having their corporate giving program and granting their products, Citrix organizes programs together with their employees.

- 1) Community Involvement Committee: Employees can recommend qualified charities of their choice and budget dollars are allocated to support them.
- 2) Employee Match Program: Full-time employees worldwide can participate in this program by donating up to \$1,000 to qualified charities of their choice. Citrix, in turn, will match up to \$1,000 per employee per year to the designated charity.
- 3) Volunteer Day.

3.4 THE HISPANIC-OWNED COMPANIES

South Florida is home to more than 159,000 Hispanic-owned businesses, most of which are medium or small in size. Medium-sized companies are defined as those having revenues between \$10 million and \$60 million per year in revenue and between 50 and 200 employees. Small-sized companies are defined as those having up to \$10 million per year in revenue and fewer than 50 employees.

One of the challenges corporate philanthropy is facing in South Florida is motivating the Hispanic community — especially company leaders with key roles in the community — to develop social programs for their communities, regardless of company size.

In this sense, the Hispanic Business Group of the Greater Miami Chamber of Commerce works together with Donors Forum of South Florida, United Way of Miami-Dade and the Promotion of Philanthropy. At the 2002 Goals Conference of the Greater Miami Chamber of Commerce the

guide “Developing a Giving Program in Hispanic –Owned Companies” was presented. This guide is aimed at introducing leaders from these companies to the philanthropic sector and at carrying out programs in favor of their communities.

According to the guidebook, “the Hispanic historically have viewed organized philanthropy as an activity limited only to the very wealthy. The trend is changing and Hispanic corporate leaders are realizing that corporate philanthropy is simply an extension of their longstanding tradition of helping others, their family, place of worship, and neighbors ... Hispanics are taking responsibility to give back to this country and to their community. ”

4 COMMUNICATIONS STRATEGIES

4.1 INFORMATION TECHNOLOGY AS A TOOL OF INTERNAL COMMUNICATION

Citrix Systems

To honor their product (software), this company uses exclusively electronic means as communication instruments. The only information the company prints is that which is related to basic institutional information or to new products. The rest of the information is delivered by e-mail or through the Internet. The members of Citrix’s internal communication team think that the updating of information is so fast that if news is printed it is no longer valid.

They also apply new technologies to the organization of meetings and they organize a quarterly teleconference, two annual meetings with all the employees and meetings and parties with employees’ relatives. The building, decoration, food, machines, offices, work tools and informal clothing of the employees all communicate the culture of the company.

4.2 E-PHILANTHROPY

United Way of Miami-Dade

United Way is the largest private funder of human services in Miami-Dade County; their contributions reach people in need through more than 250 health and human care programs, agencies and community initiatives. Its budget exceeds \$87 million. It has a strong presence in the community and receives resources of varied amounts from individuals, the government, companies and employees.

One of United Way's recent initiatives with a special focus on communication and philanthropy is "MyEgift" (www.unitedwaymiami.org/MyEgift), an online application that will help the company and its staff create more efficient ways of making gifts, collect those gifts and report them back to United Way. When entering the site the donor should enter his name and password to enter to the personalized page, where he can track the grants made as well as grant recipients. The donor will have access to different stories told by children, young people and adults describing how their lives changed upon receiving the grant. At the same time, a new grant can be made by selecting one of these giving methods — payroll, cash/check, credit/check card, billing and stock. This initiative is completed with posters of the site distributed among potential donors and the companies that help United Way. United Way has a detailed plan of communication and marketing, both based on the institution's strategic management.

4.3 PHILANTHROPY & THE PRESS

The Miami Herald

The Herald is one of the most important newspapers in Miami with a circulation of 300,000, along with El Diario de las Américas and Sun-Sentinel. It ranks seventh on a national scale. Its Spanish edition leads Spanish-language newspapers in the U.S., with a Sunday circulation of 99,000.

The Miami Herald Publishing Company is particularly interested in programs that promote literacy, community-wide leadership in a truly diverse community and programs that create shared values. *The Herald* established Herald Charities to help meet the needs of the community during the holidays (Miami-Dade and Broward Counties). The company also works year-round to develop partnerships — such as "The Annual Spelling Bee" together with Dairy Council of Florida and Barry University — in which proceeds from social events are donated to Herald Charities. The funds are used primarily for programs involving at-risk youth, literacy and education. *The Herald* has different types of support such as in-kind donations by public service advertising and the Herald Happenings Buy/Match Program. One of the most interesting programs is the prize-giving ceremony of the Silver Knight Awards, where more than 18,000 students have been awarded. The Silver Knights are high school seniors who have excelled in academics and have given themselves unselfishly to serve others in the community.

Together with the programs and activities developed for the benefit of the community, the newspaper (both English and Spanish editions) issues annually a Special Supplement for the celebration of the “National Philanthropic Day.” The last supplement was “Giving in the shadow of grief.” During the year, *The Herald* issues educational supplements like “Newspapers in Education,” “World Leaders in Women’s History” and “Fire Drills — The great escape!” in partnership with some companies.

Likewise, the newspaper covers events from the Third Sector. News related to research, grants, as well as programs, projects or initiatives that have a high impact on the community are published according to a range of topics and geographic scope (local, national, international). They appear in “Metro-Miami,” “Business” or “National News” sections, in the main section of *The Miami Herald* or in Panorama in the Nuevo Herald. When the topic is important editorials are written and articles written by foundations’ presidents are published. The article “Dade Community Foundation’s grants make a difference” was published April 27, 2002, in the section “Saturday Speak Up” and was written by the foundation’s President, Ruth Shack.

Knight Foundations

The John S. and James L. Knight Foundation promotes excellence in journalism worldwide and invests in the vitality of 26 U.S. communities. In addition, the Knight brothers founded a communications company that still publishes newspapers.

The program on journalism emphasizes education for current and future journalists, supports the freedom of the press and promotes different approaches to quality journalism. The foundation has made a series of major grants to support education, especially fellowship programs for journalists in well-known universities like Columbia, Harvard, Maryland, MIT, Michigan, Stanford and Yale.

4.4 STRATEGIC COMMUNICATION PLAN

Dade Community Foundation

The mission of this community foundation is to find the right people to make grants. To fulfill this mission they develop an interesting, detailed, strategic communication plan for professional advisors who will guide business leaders (their potential donors).

This plan includes attendance at key meetings and contact with strategic people to reach potential donors. It helps to find the appropriate speech to speak the same language — “we invite a partnership with us.” Moreover, the plan tries to find common ground between the needs of the community and donors’ interests. The foundation publishes a report for the sector in general — “Donors and Community” — and one specially for professional advisors written in technical language (including lawyers’ and accountants’ jargon) that provides them with information about the foundation’s philanthropic work. Though the foundation has its own budget to finance programs in the community it also receives help from international foundations such as W. K. Kellogg Foundation and Ford Foundation.

5 ACKNOWLEDGEMENTS

I would like to thank to all of the people who were part of this program, mainly for their warm welcome and openness to dialogue. I would also like to thank the staff of the Donors Forum who accompanied me during these two weeks and made me feel like one of them, and WINGS and Grupo de Fundaciones (GDF) for the possibility of fulfilling this professional experience. It helped me to broaden my knowledge, to free my capacity of initiative and encouraged me to think about new projects and establish new relationships with people working in institutions like GDF and particularly in my profession.

Sincerely,

Elizabeth Simone