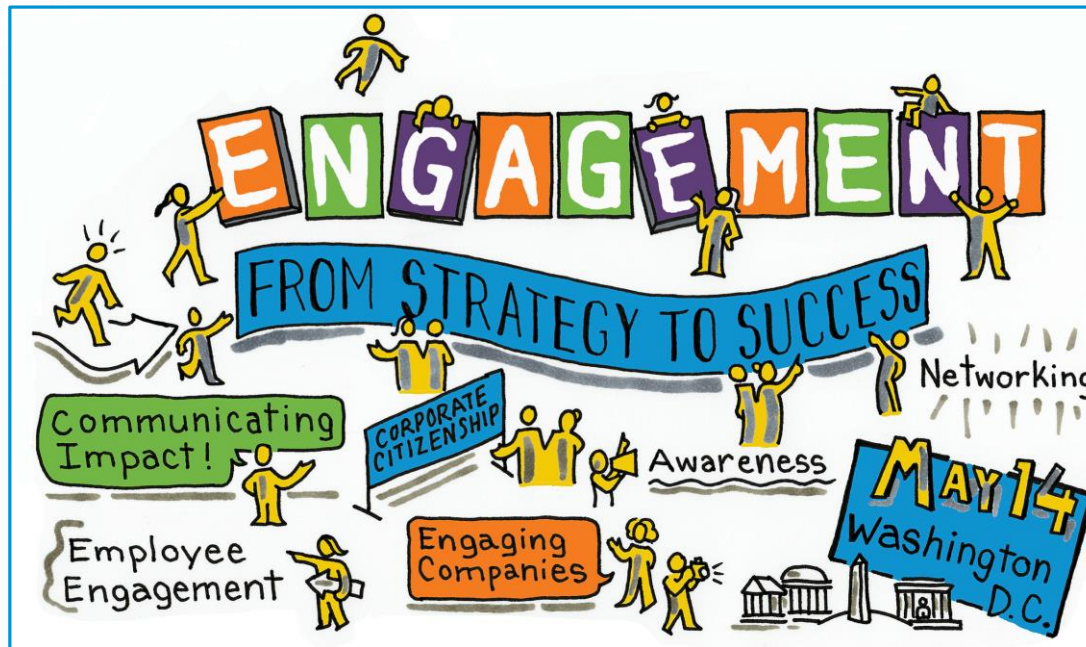




2015 Annual Membership Assembly



#EngagedGiving



@AmerCharities



The Power of Collaboration, Shared Values and Partnerships

Panelists

Heather Lofkin Wright, PricewaterhouseCoopers – @PwC_LL
Kimberly Young, America's Charities – @AmerCharities
Emily Simone, Lockheed Martin – @LockheedMartin

Moderator

Steve Greenhalgh, America's Charities – @SKGimpact

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The POWER of COLLABORATION, SHARED VALUES and PARTNERSHIPS



Heather Lofkin Wright, pwc

TRIPLE BOTTOM LINE



2 SHIFTS

Conversations are changing...

How does our effort influence consumers?

Expectations are changing...

REPORTING

- Have a STORY to tell!

Corporate view is now

TOP-DOWN

AND BOTTOM-UP

- What are our GOALS?
- What can I do to be INVOLVED and bring VALUE?

How does this strengthen our BRAND?

Will this attract & retain EMPLOYEES?

Leadership interest is GROWING

Conversations about GIVING are happening internally

Kimberly Young, America's Charities

Paradigms are SHIFTING

... Driven by SOCIETY

- More emphasis
- on measurement
 - goals
 - employees

INVEST in My COMMUNITY

Use PRODUCTS + SERVICES to

Better Communities

Shared commitment GIVING + SHARED VALUE

GIVE TOGETHER in a MUTUALLY-BENEFICIAL WAY

Embedded Collaboration

Discussion

Advice to non-profits ... private sector knows who they want to work with

- Non-profits need to do their homework

Form concrete, sincere relationships

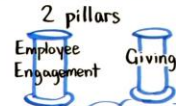
Takes patience + iteration

Make it easy for people to CONNECT to opportunities

Integrate young people into leadership decisions about giving + strategy

Emily Simone, Lockheed Martin

Being a GOOD NEIGHBOR



Focus on STEM

Grow the Pipeline

More girls + Minorities

50,000 engineers + 22,000 former military in LOCKHEED MARTIN

Fits our employee demography

- Find companies + causes to which you are COMMITTED
- Reporting + see RESULTS
- Work with LEADERS and iterate efforts collectively

SHARE YOUR COMMENTS + IDEAS



America's Charities MEMBER ASSEMBLY • MAY 14, 2015

TRENT WAKENIGHT



The Power of Collaboration, Shared Values and Partnerships

Heather Lofkin Wright
Corporate Responsibility Director
PricewaterhouseCoopers
@PwC_LL



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Corporate responsibility: evolving expectations

Sustainability is about creating profitable, growing companies that approach zero/negative and even net positive environmental and social footprints – and helping their suppliers and customers do the same.

Opportunity

Risk management

Where many organizations start

Compliance

Business opportunity

Where some organizations are headed

Operational effectiveness

Increasing value

Where leaders are headed

Product innovation,
Co-creation

Published corporate responsibility & sustainability reports

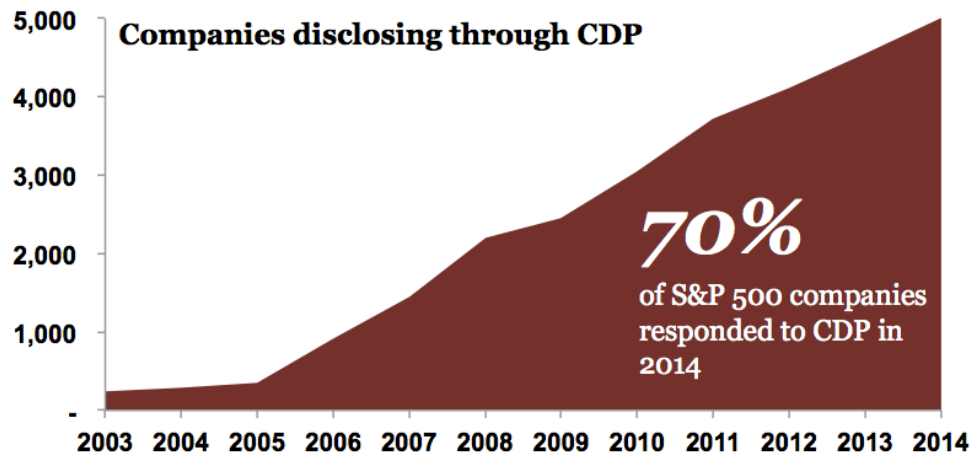
2013

7,896

2000

823

Source: CorporateRegister.com



Source: Global Reporting Initiative

Corporate responsibility: a matter of business

Why?

As a society, the issues we face have become more complex and are becoming intertwined with global and economic challenges. To maximize the impact that a company can have on these sizable issues, drive greater operational efficiencies and further define one's brand in the marketplace, corporate responsibility needs to evolve as an integral part of a company's overall purpose and business strategy.



Brand and reputation

74% of global CEOs say measuring and reporting total non-financial impact contributes to long term success. 82% of investors are already considering environment, social, governance issues in their investment decisions.



Employee engagement

Employees most committed to their organizations put in 57% more effort on the job – and are 87% less likely to resign – than employees who consider themselves disengaged.



Efficiencies

Nearly 70% of the 500 global supply chain executives recently surveyed say sustainability will play an important role in how they manage their supply chains through 2015.

Sources:

[PwC's Annual Global CEO Survey 2014](#)

[PwC's Investor Survey, May 2014](#)

[PwC's Global Supply Chain Survey 2013, September 2013](#)

Corporate responsibility: making the shift *Change needs to come from all sides*

Leadership vision or employee passion alone cannot create sustainable change within a company culture. However, when the two work together towards the same goals, there is a greater potential for change and positive impact.

When leadership is transparent about their vision and support of a goal, such as reducing carbon emissions, employees understand what is behind their strategy and can strive to align their efforts with the strategy. With the right framework in place, this allows employees to pursue their ideas and to innovate in ways that align with leadership's vision, such as finding new ways to increase the efficiency of a manufacturing process.



Employee engagement: providing easy paths to giving back in meaningful ways



Employee engagement and community outreach

- Does the opportunity align with our corporate responsibility commitments (youth education, pro bono, carbon reduction, employee engagement, PwC Charitable Foundation)?
- Are there opportunities to invite multiple people to give back in various ways: financial donations, board seat service, volunteer opportunities pro bono engagement?
- Is this a one-off event or a sustainable program?
- Can 1+1>2: how does this opportunity allow us to achieve something we would not have accomplished without collaboration?
- Are there additional benefits to this program? (i.e. networking, professional development, staff affinity, team building, cost savings...)
- What can we report back to individuals about their impact?
- How can we summarize the ROI for the community, our participants, and the firm?



The Power of Collaboration, Shared Values and Partnerships

Kimberly Young
Vice President, Business Development
America's Charities
@AmerCharities



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Emerging Trends in Corporate Philanthropy Operations

CURRENT PARADIGM

EMERGING PARADIGM

Values	Values and Value Created (ROI)
Charity Mindset	Investment Mindset
Responsive	Proactive and Responsive
Transactions	Relationships
Needs Focused	Outcomes Focused
Organizations	Issues
Short Term	Short and Long Term
Isolated	Aligned and Integrated
Invisible	Visible
Cash, Employees	Cash, Employees, Full Value Chain
Reports	Knowledge
Managerial function	A Leadership Function

Emerging Model for Employee Engagement

“Snapshot reveals the most dramatic shift we’ve seen in workplace giving”

Companies & Organizations Are Committed

Companies and organizations continue to recognize the benefits of a strong employee giving program with branded initiatives that offer choice and increase engagement.

New Engagement Strategies

Employers are creating new giving models to involve and engage employees, particularly younger employees.

Technology & Digital Culture

Technology and digital culture are transforming the employee giving experience.

Paradigm Shift at Hand

A paradigm shift is taking place—a new model is emerging that empowers employees to participate in the giving experience inside and outside the walls of the workplace.



Snapshot 2013

Trends and Strategies to Engage Employees in Greater Giving

Top Components of Future Campaigns

“Employers understand this changing environment and are realigning in ways that integrate corporate goals, employee expectations, and opportunities to grow giving.”

1 Payroll Contributions

2 Matching

3 Choice

4 Goals

5 Incentives

6 Year-Round Giving

7 Individual Giving Accounts

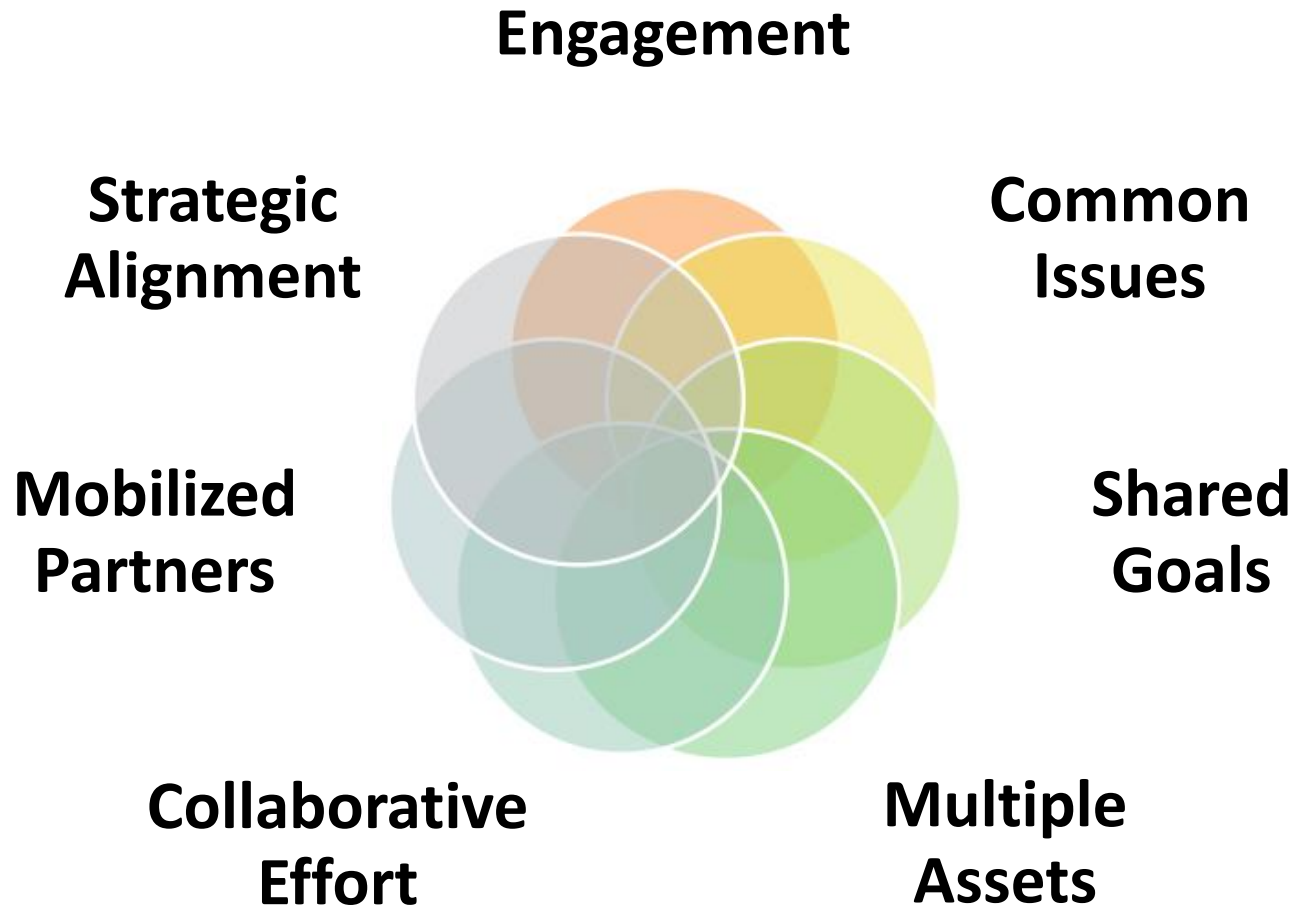
8 Employees Promote Their Favorite Charity



Snapshot 2013

Trends and Strategies to Engage
Employees in Greater Giving

Shared Value Partnerships





The Power of Collaboration, Shared Values and Partnerships

Emily Simone

Director of Global Community Outreach
Lockheed Martin
@LockheedMartin

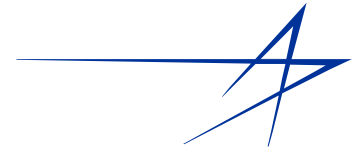


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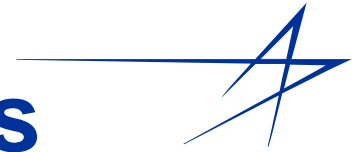
Lockheed Martin in the Community



Helping to address pressing community needs, with a focus on two key business issues - STEM education and military/veteran causes.



Pillars of Community Relations

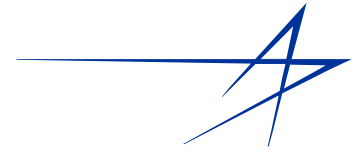


Employee Engagement

- **Individual**
 - Personal volunteerism
 - Corporate-sponsored activities
- **Team-based**
 - Group volunteerism
 - Drives, collections, etc
- **Executive**
 - Board participation
 - Team leaders & champions
 - Volunteerism

Giving

- **Individual**
 - Workplace campaigns
 - Vacation donation
 - University matching gift program
- **Corporate**
 - Contributions
 - Sponsorships and events

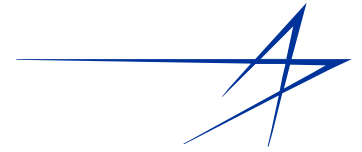


Our Evolution

- **Refined focus areas to better align with business goals**
 - Focusing on two business issues: STEM education and military and veteran support
 - Defined targeted impact we want to have on those two issues
- **Strengthening contributions program**
 - Shifting from smaller grants to larger, more impactful grants
 - Implemented new measurement process
- **Aligning strategic giving with employee volunteer efforts**
 - Using our people to extend our contributions and increase impact
- **Growing internationally**

Driving for Greater Impact

What We Look for in a Partner

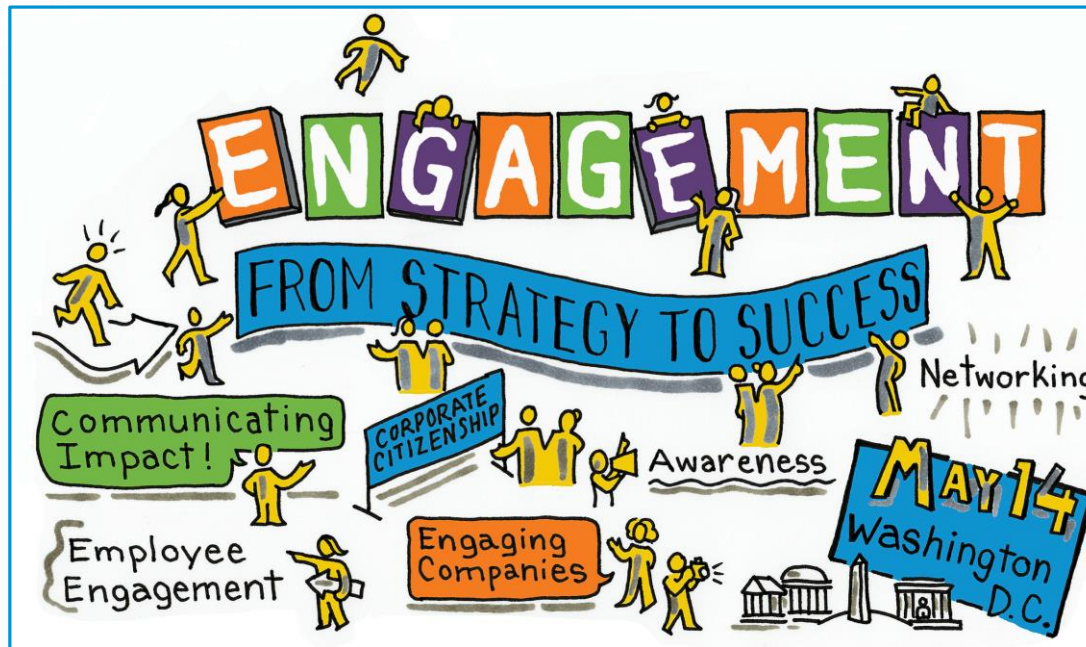


- Driving results within our focus areas
- Demonstrate and measure impact
- Provide opportunities to further contributions with employee engagement
- Collaborative approach





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