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I. WELCOME

San Francisco is experiencing one of the greatest periods of wealth creation in history. At the same time, 1 in 5 of our neighbors here in the Bay Area cannot afford to meet their basic needs. In May 2014, SF Gives inspired 20 Bay Area companies to invest \$10 million in the fight against poverty to directly address this divide.

Created in partnership with Tipping Point Community and the Boston Consulting Group, the SF Gives Playbook provides powerful best-in-class examples of Bay Area companies' giving efforts and offers a framework for building or refining a high-impact, customized social responsibility program.



II. KEY FINDINGS



BAY AREA PHILANTHROPIC GIVING BY INDUSTRY

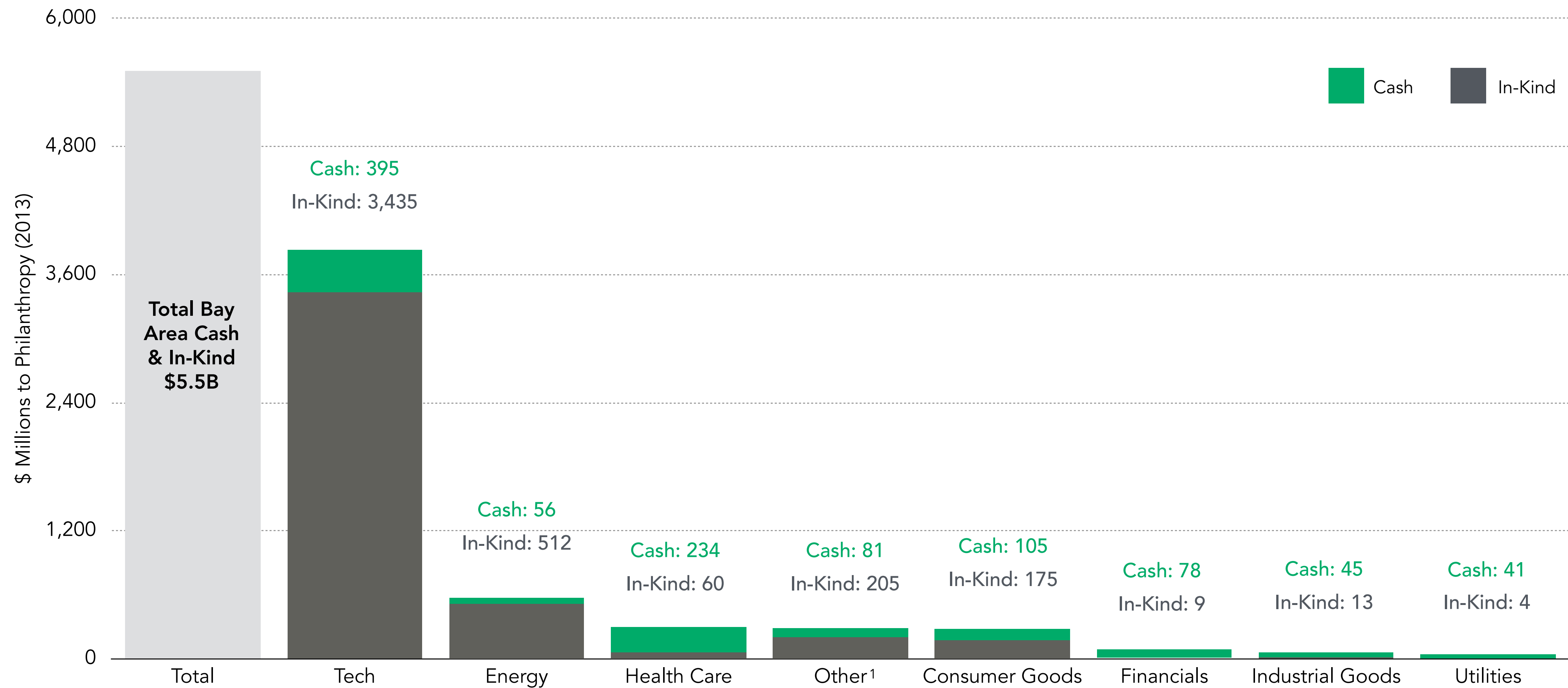
Corporate philanthropy across all industries in the Bay Area totaled ~\$5.5B in 2013. When looking at total giving, both cash and in-kind, **tech companies gave back more than any other industry, at 70% of total giving.**

The tech sector gives nearly 0.5% of revenues in valued in-kind donations, leading all other industries, but falls near the bottom of the pack at .05% in cash giving. This may be because of the lack of liquid cash at many highly valued yet early stage companies in the tech sector or the influence of shareholders at private companies.

	Tech	Energy	Health Care	Other	Consumer Goods	Financials	Industrial Goods	Utilities	Total
Giving Revenue	\$3.8B	\$0.6B	\$0.3B	\$0.3B	\$0.3B	\$0.1B	\$0.1B	\$0.1B	\$5.5B
Industry Revenue	\$730B	\$238B	\$202B	\$140B	\$188B	\$56B	\$55B	\$34B	\$1,643B
% of Giving Revenue	0.52%	0.24%	0.15%	0.2%	0.15%	0.15%	0.11%	0.13%	0.33%

Note: Bay Area includes the following counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma
 Source: Orbis (29,277 total number of companies), Thomson Reuters, BCG Analysis

TOTAL BAY AREA CASH + IN-KIND GIVING BY INDUSTRY



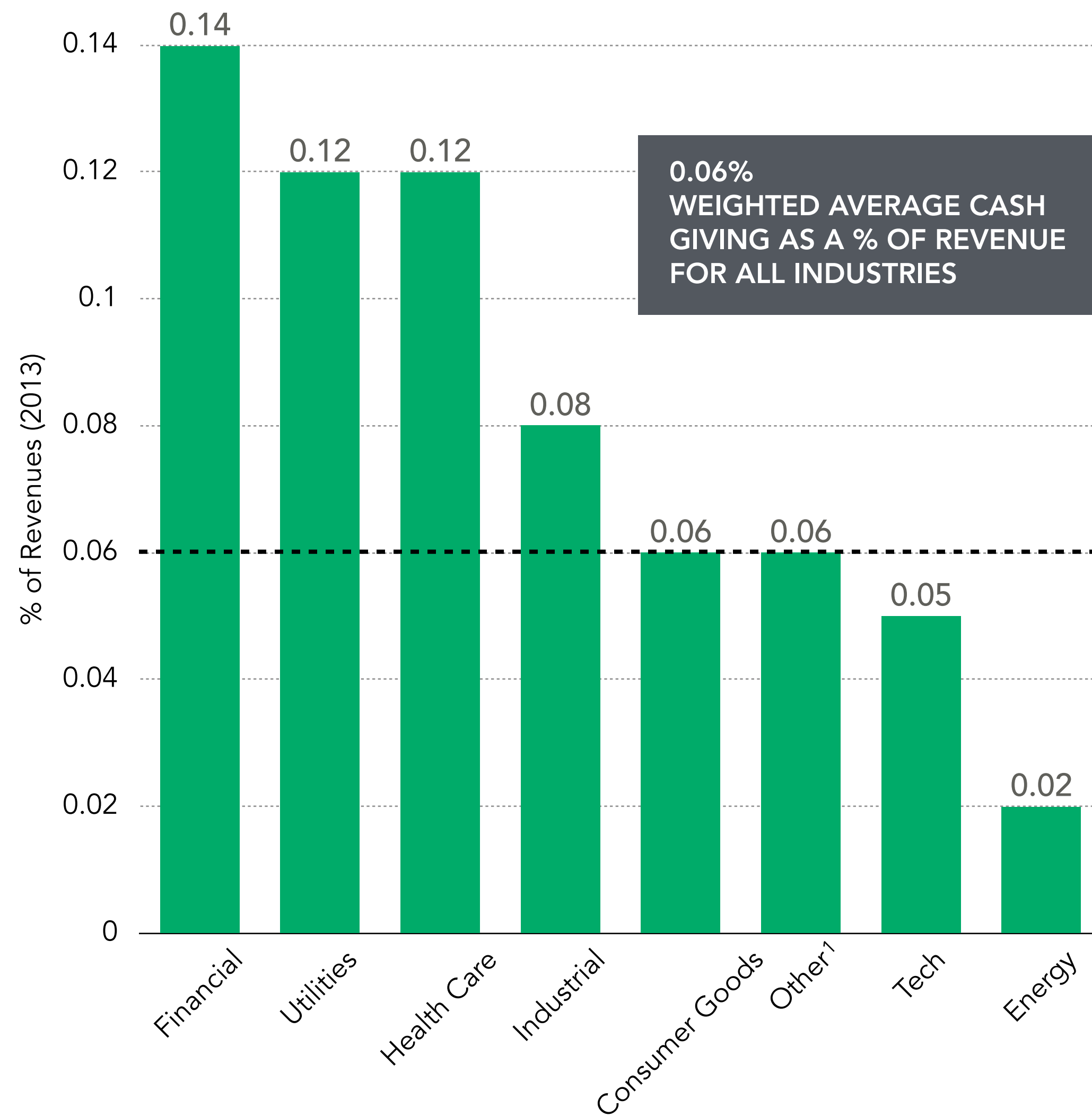
Across Industries	\$	% of rev
Total Cash	\$1.0B	0.06%
Total In-Kind	\$4.5B	0.27%
Grand Total	\$5.5B	0.33%

1. Other represents services industries such as transportation, education and travel
 Note: Bay Area includes the following counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma
 Source: Orbis (29,277 total number of companies), Thomson Reuters, BCG Analysis

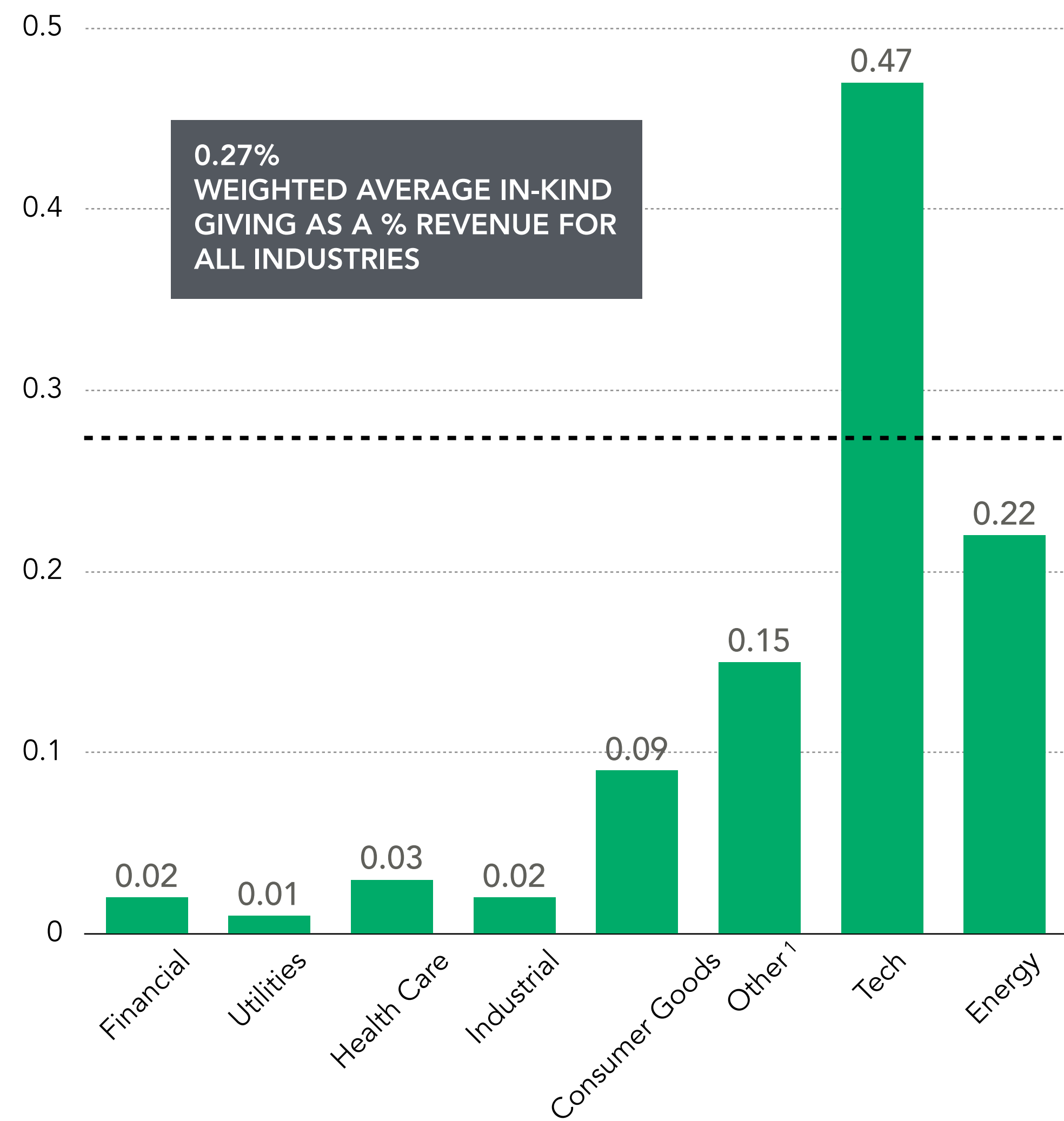
PERCENTAGE OF CASH VS. IN-KIND BY INDUSTRY

Whether providing cash or in-kind donations, impact should always be at the core of philanthropic giving and respond directly to recipient needs.

Cash Giving



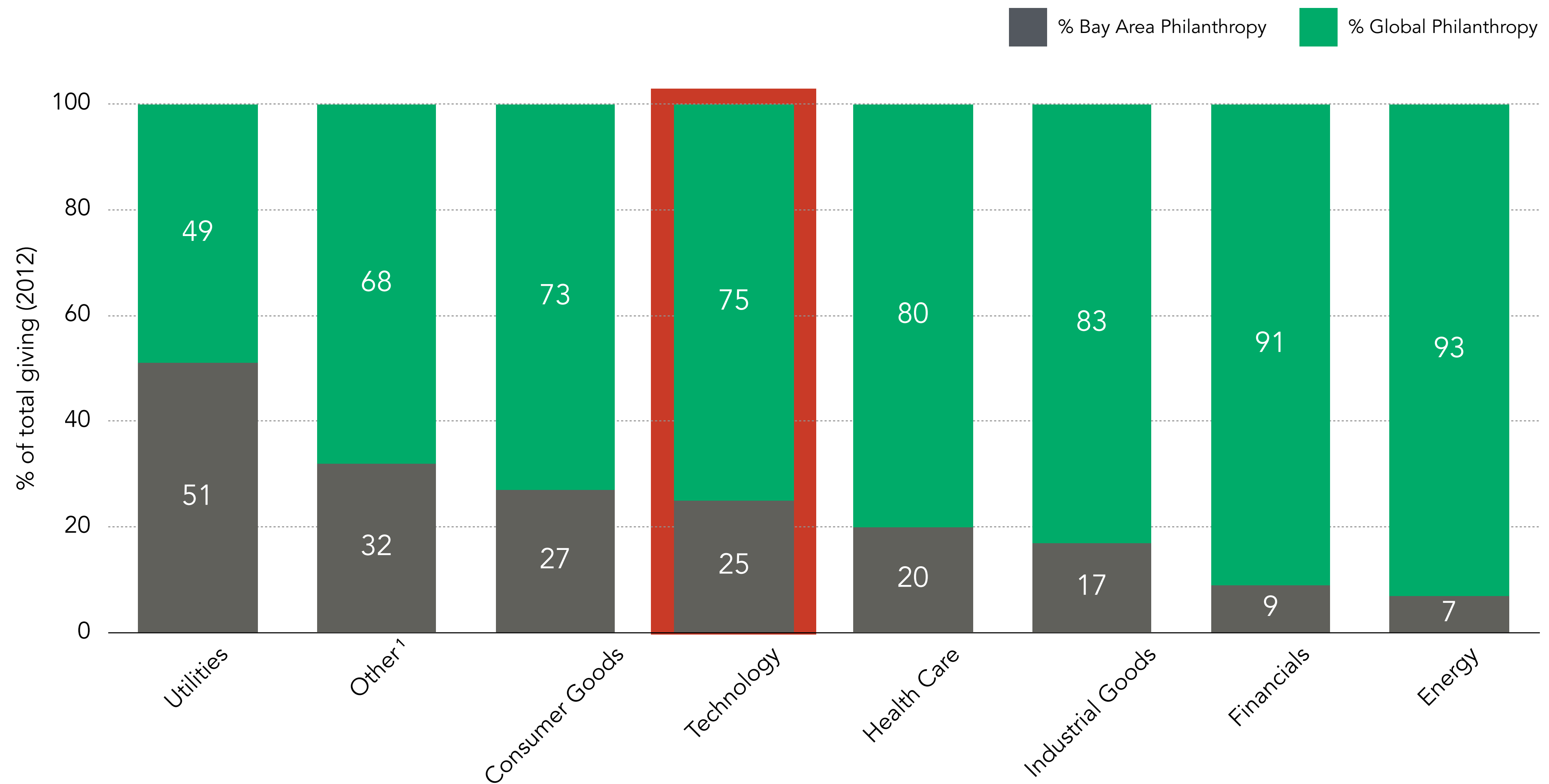
In-Kind



1. Other represents services industries such as transportation, education and travel
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 Source: Orbis (29,277 total number of companies), Thomson Reuters, BCG Analysis

LOCAL VS. GLOBAL PHILANTHROPY

Many Bay Area companies are international in their business reach and focus their philanthropic efforts on impoverished communities around the globe. But it's important for companies to contribute to the communities they call home, where their success can create unintended consequences for our low-income neighbors who lack the opportunities or resources required keep up in a flourishing economy.



1. Other represents services industries such as transportation, education and travel
 Note: Bay Area includes the following counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma
 Source: Orbis (29,277 total number of companies), Thomson Reuters, BCG Analysis

A LOOK AT WHAT'S POSSIBLE

What if, as a corporate community, we made a few key changes to the way we give back?

\$341M

ASPIRATIONAL

1% of revenue

20% of cash

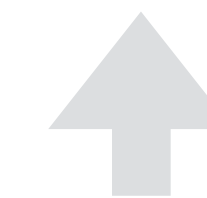
30% given locally

CURRENT

0.52% of revenue

10% of cash

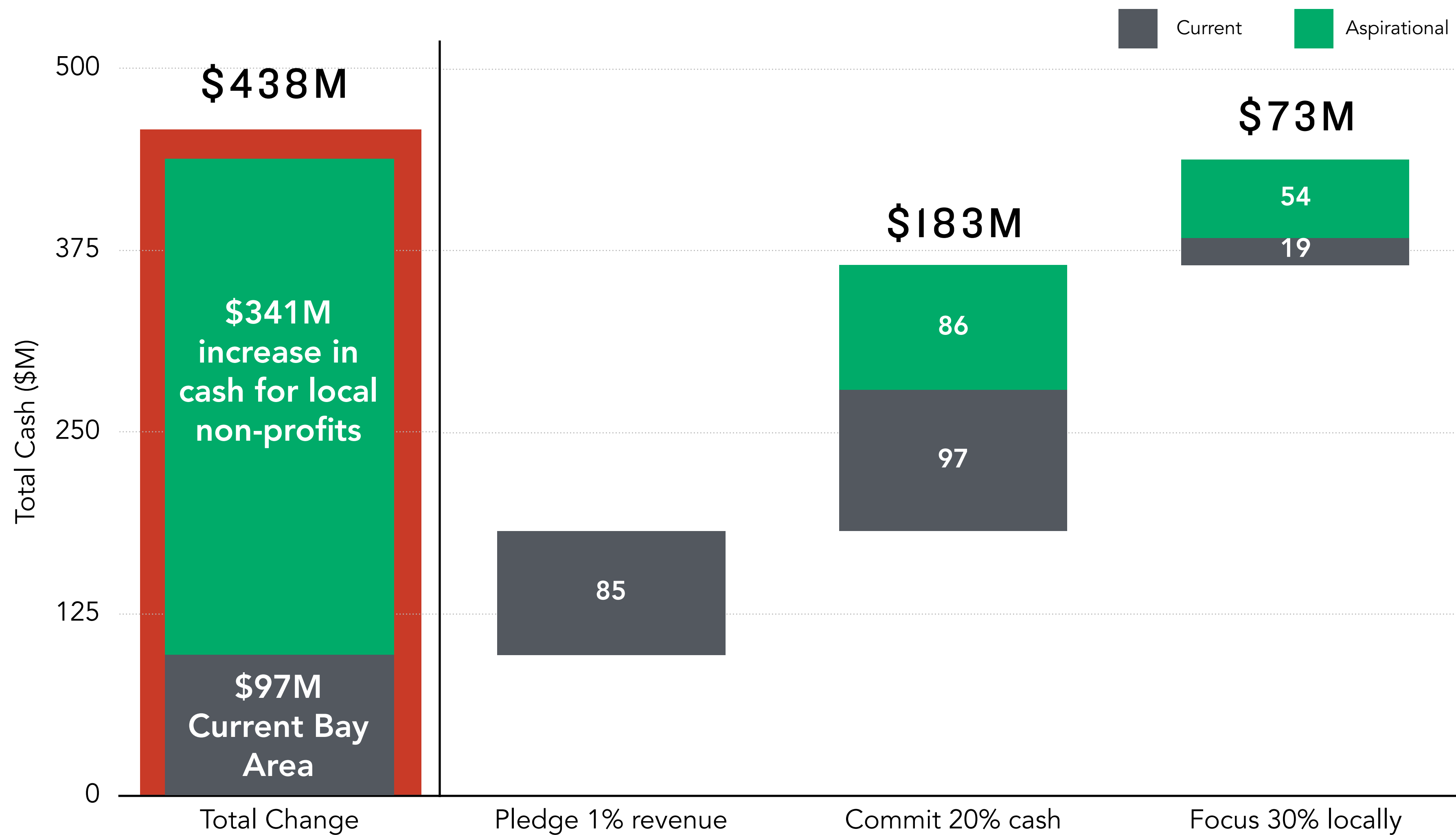
25% given locally



Note: Bay Area includes the following counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma
Source: Orbis, Thomson Reuters, BCG Analysis

SMALL SHIFTS = BIG GAINS

We played with best-in-class and aspirational figures to ask the question: What more can we do? **The answer is compelling: We could generate \$341M more in cash giving to the social sector per year with a few shifts.**



Note: Bay Area includes the following counties: Alameda, Contra Costa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma
 Source: Orbis, Thomson Reuters, BCG Analysis

\$341M CAN FIGHT POVERTY RIGHT HERE IN OUR OWN BACKYARD

Below are four examples of how these shifts in corporate giving could impact our local community. These are intended to show the magnitude of potential outcomes and do not represent current SF Gives investments or recommendations.

\$341M

EXAMPLE A
4.2X



SF Food Bank

- Mission is to end hunger in San Francisco and Marin
- 449,000 more meals served per day

EXAMPLE B
6.8X



Affordable Housing Trust Fund

- Money in the budget the City has set aside to address affordable housing
- 1,360 additional units per year¹

EXAMPLE C
0.5X



Housing and Homeless Services

- Department within San Francisco government focused on homeless issues
- 26,600 more people placed in "permanent supportive housing"²

EXAMPLE D
2.0X



SF Unified School District

- Seventh-largest school district in California, educating over 57,000 students every year
- 7,000 additional teachers in the classroom³

1. Calculated using an average subsidy for each housing unit of \$250K
 2. \$81.5M of homeless budget goes to rent subsidies and assistance for 6,355 people living in "permanent supportive housing"
 3. Calculated using an average starting teacher's salary of \$48.5K
 Source: Thomson Reuters, Orbis, SF Food Bank, SPUR, SFGate, SFUSD

WHY COMPANIES GIVE

Beyond the social impact companies can achieve through their philanthropic efforts, benefits range from employee recruitment and development to business benefits and innovation.

Corporate Philanthropy

	Employee Retention	Employee Development
Employee Impact	<ul style="list-style-type: none"> • Attracts top talent among job seekers and students/pupils (future talent) • Fosters employee motivation and sense of belonging to the community 	<ul style="list-style-type: none"> • Enhances employee skills and competencies (e.g., via coaching) • Broadens employees’ horizons and develops internal employee network

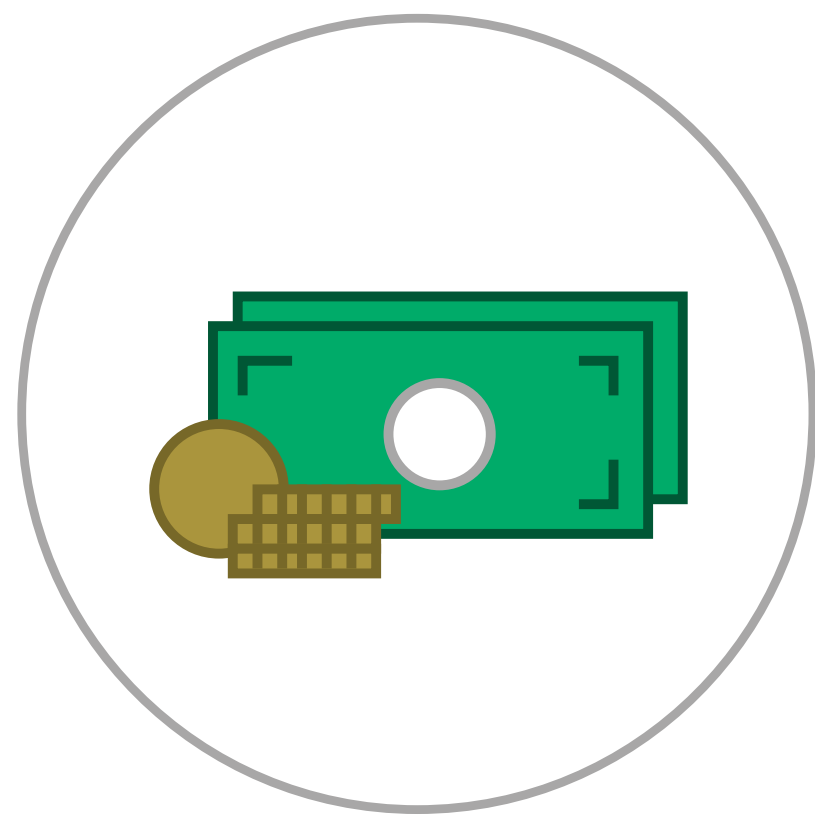
	Customers	Business Partners	Innovation
Business Impact	<ul style="list-style-type: none"> • Builds sustainable and positive brand image in mind of customers • Generates access to new customers (e.g., in emerging markets) 	<ul style="list-style-type: none"> • Fosters trust and sustainable relations with business partners (e.g., suppliers) • Generates partnerships with new business partners (e.g., across industries) • Mitigates risk of competitive pressure and advances collaboration with competitors 	<ul style="list-style-type: none"> • Nurtures innovation and product development • Fosters collaboration with new sources of ideas (e.g., employees across departments in partnership with universities)

III. HOW TO START A SOCIAL RESPONSIBILITY PROGRAM

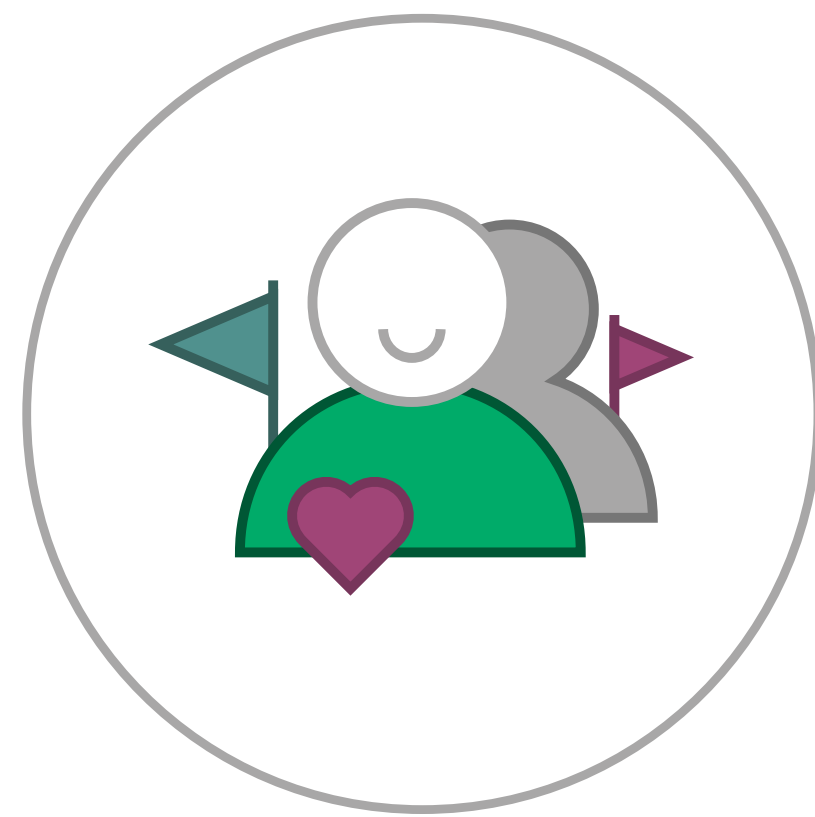


THE FOUR LEVERS OF GIVING BACK

There is more than one way to give back. By customizing the right combination of cash, volunteering, donated products and services, and community engagement, any company, regardless of its size or stage, can build an impactful program.



Monetary



Volunteering



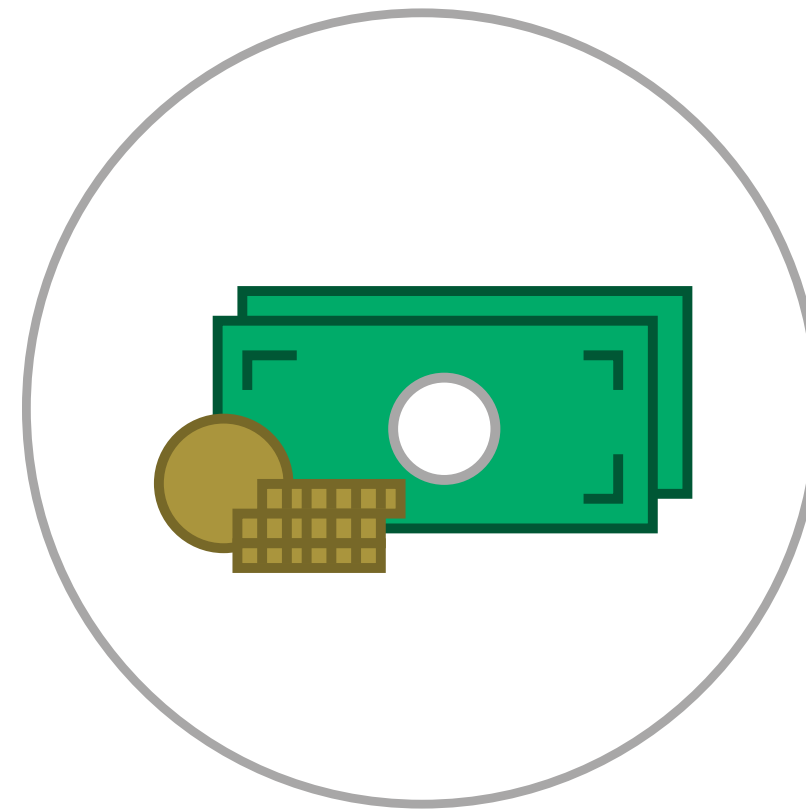
Products + Services



**Community
Engagement**



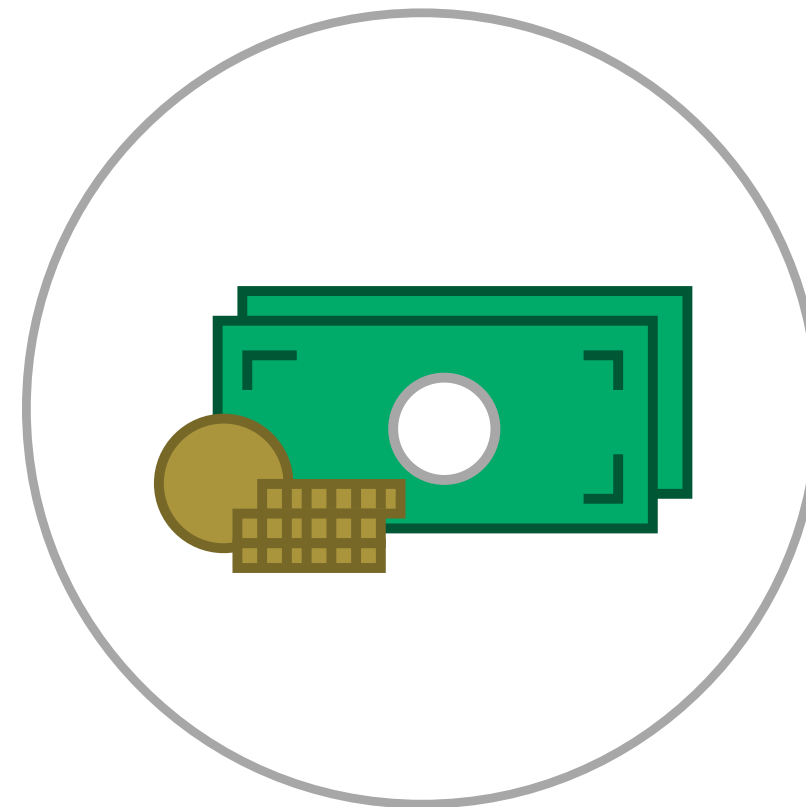
MONETARY



Giving efforts centered around monetary contributions such as grants and employee matching programs.

Offerings	Getting Started	Dedicated Effort	Best in Class
Corporate grants	<0.1% of rev.	0.1%–0.2% of rev.	>0.2% of rev.
Employee matching	<1-to-1	1-to-1	3-to-1
	<\$1K	\$1K-\$10K	>\$25K
Equity	None	>0.1%	>0.1%
Employee-directed grants	\$50 per employee	\$250 per employee	\$500 per employee
Dollars for doers	5+ hour threshold	1–2 hour threshold	No threshold
	<\$10 match per hour	\$10–\$20 match per hour	>\$20 match per hour

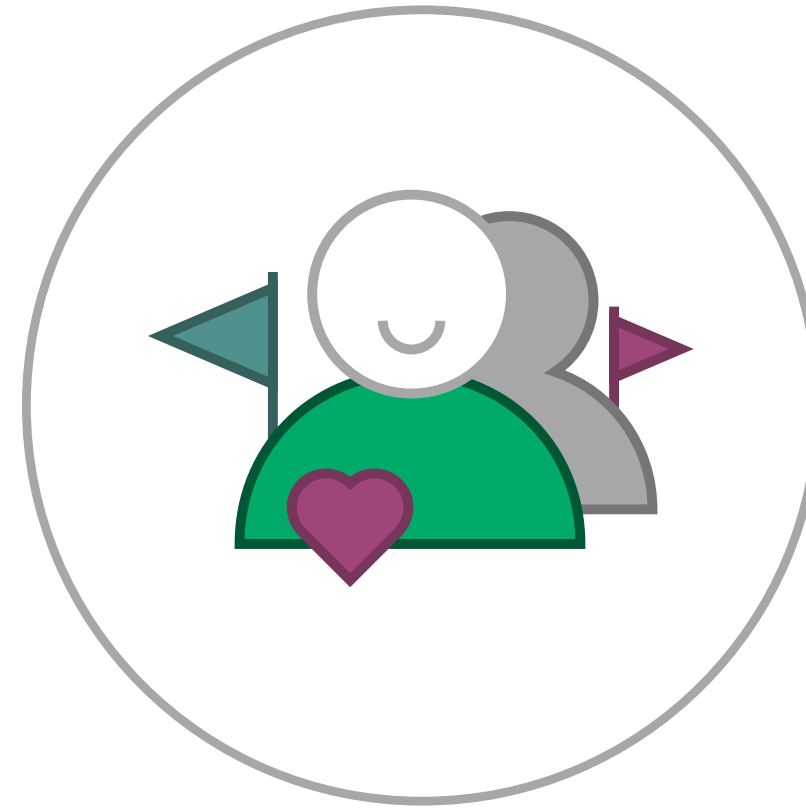
MONETARY



LEVI STRAUSS & CO.

Levi Strauss & Co. has a long history of philanthropy and continues to find new and innovative ways to engage in grant-making. Historically, the company has committed an average of 2.5% (~\$9–10M per year) of its earnings to support company-wide philanthropic investments. The company created the Levi Strauss Foundation more than 60 years ago as a “rainy day fund” to ensure consistent, long-term community support regardless of business performance. Through the Levi Strauss Foundation, the company invests in long-term social change, while direct company grant-making connects to current business initiatives and works to enhance the company’s reputation beyond the marketplace.

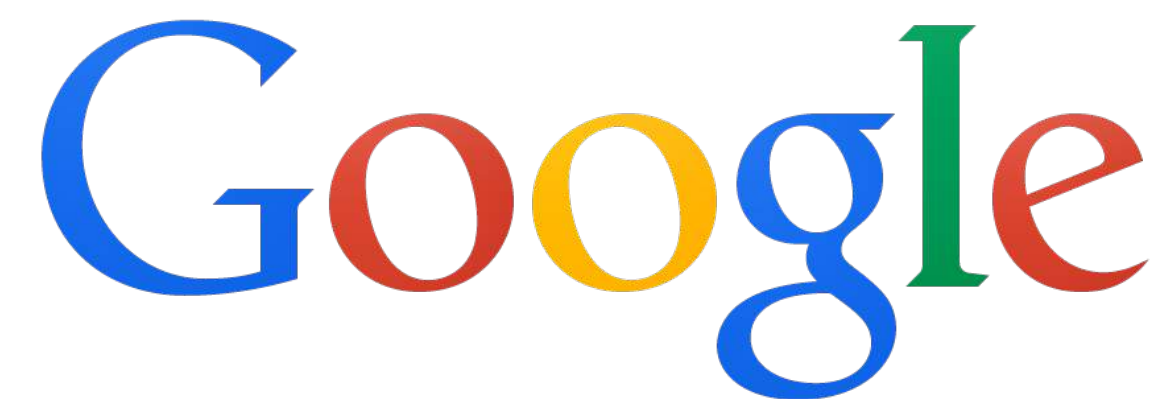
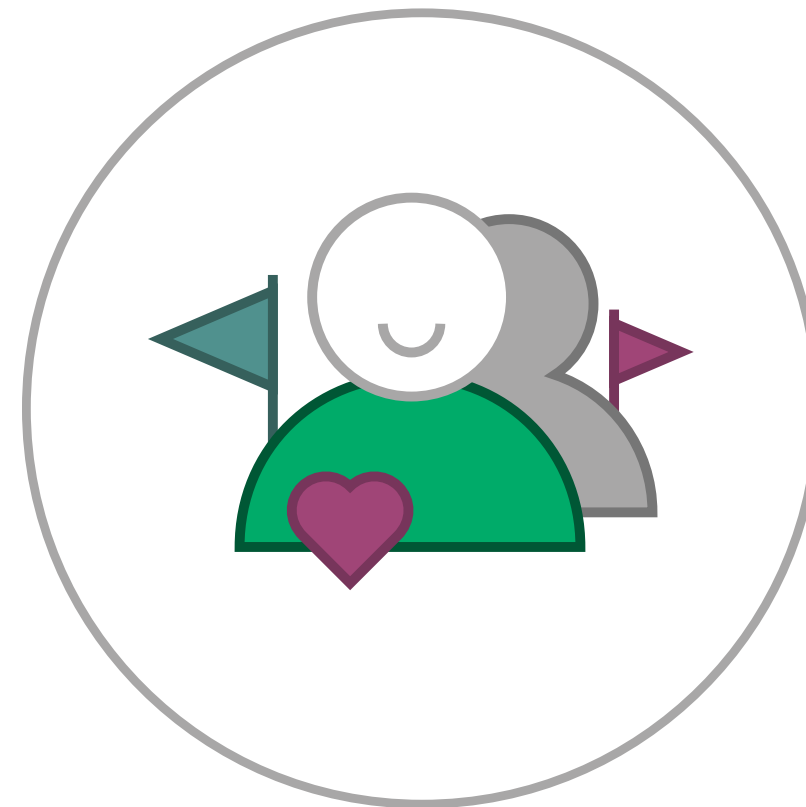
VOLUNTEERING



Time granted to send employees into the community such as company-sponsored volunteering and board placements.

Offerings	Getting Started	Dedicated Effort	Best in Class
Company-sponsored volunteering	Once a year	Twice a year	Four times a year
PTO to volunteer	1 day a year	1 day a quarter	1 day a month
Board placement	None	Find placements for employees	Fund placements
Leaves of absence	None	1–2 weeks a year	2+ weeks a year

VOLUNTEERING



Google ReachLocal’s mission is to leverage Google’s strength in human capital, information and technology to address local community challenges and develop socially conscious leaders. With this program, employees are matched with non-profit organizations near their home office for an immersive volunteering experience. The program gives Googlers an opportunity to spend a week of sponsored volunteer time in their local community doing social impact work. Skilled volunteering is matched with gifted technical solutions, and organizations are further supported by receiving \$10 for each employee hour volunteered, ensuring that non-profits are supported in the volunteer process.



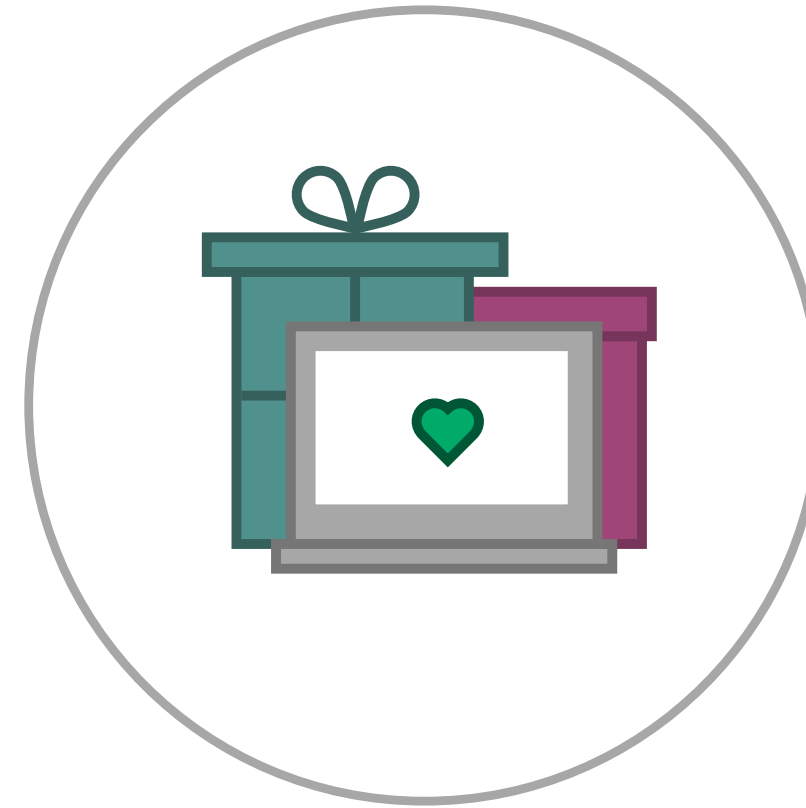
PRODUCTS + SERVICES



In-kind donations such as pro bono work and gifted products.

Offerings	Getting Started	Dedicated Effort	Best in Class
Pro bono	<1% of total rev.	1%–2% of total rev.	>2% of total rev.
Low bono (% off normal billed rate)	10–25% discount	25%–50% discount	>50% discount
Secondments	None	6 months	Year or more
Gifted products	<0.5% of product sold	0.5%–1.0% of product sold	>1% of product sold
Discounted products (% off normal billed rate)	10–25% discount	25%–50% discount	>50% discount
Product fundraising	No products	Some products	Most products

PRODUCTS + SERVICES



LinkedIn uses its platform and employees to effect change globally and drive change locally. By using its core products, LinkedIn has developed a marketplace for non-profits to find board members, source skilled volunteers and fill vacant full time positions. In addition, LinkedIn uses its core products and assets to help veterans and young people find careers and employment support. LinkedIn combines its product and service offerings with an employee-led grants program that enables employees to champion grants for non-profits that are helping to transform communities around the world.

COMMUNITY ENGAGEMENT



Efforts to bring the community into the company, such as employment for underserved populations and use of space.

Offerings	Getting Started	Dedicated Effort	Best in Class
Employment for underserved populations	1 per 1000 employees	1 per 500 employees	1 per 100 employees
Use of space/facilities for tours/meetings	Annually	Monthly	Weekly
Donations (equipment/food)	Annually	Twice a year	Monthly
Sponsorship for charitable events	1 event per year	2 events per year	3 or more events per year

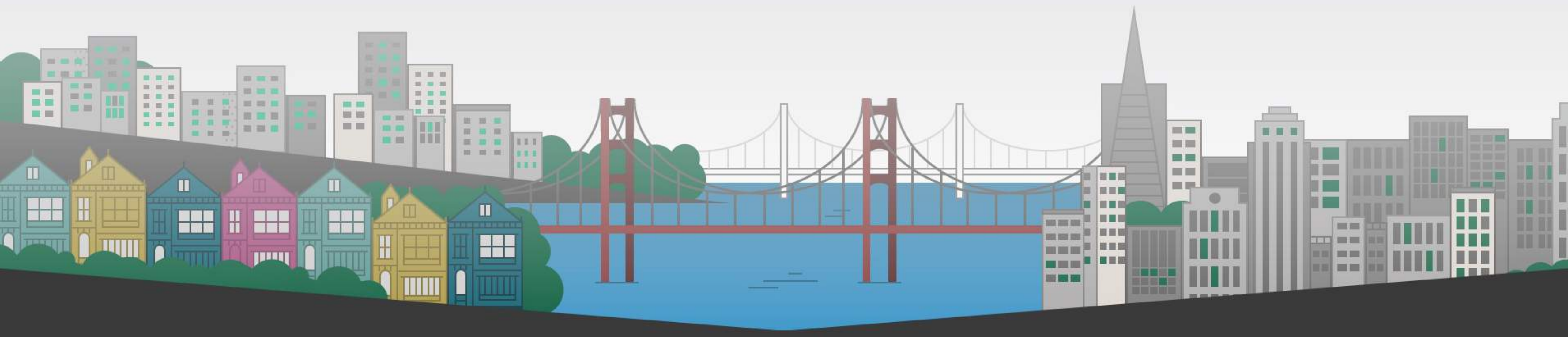
COMMUNITY ENGAGEMENT



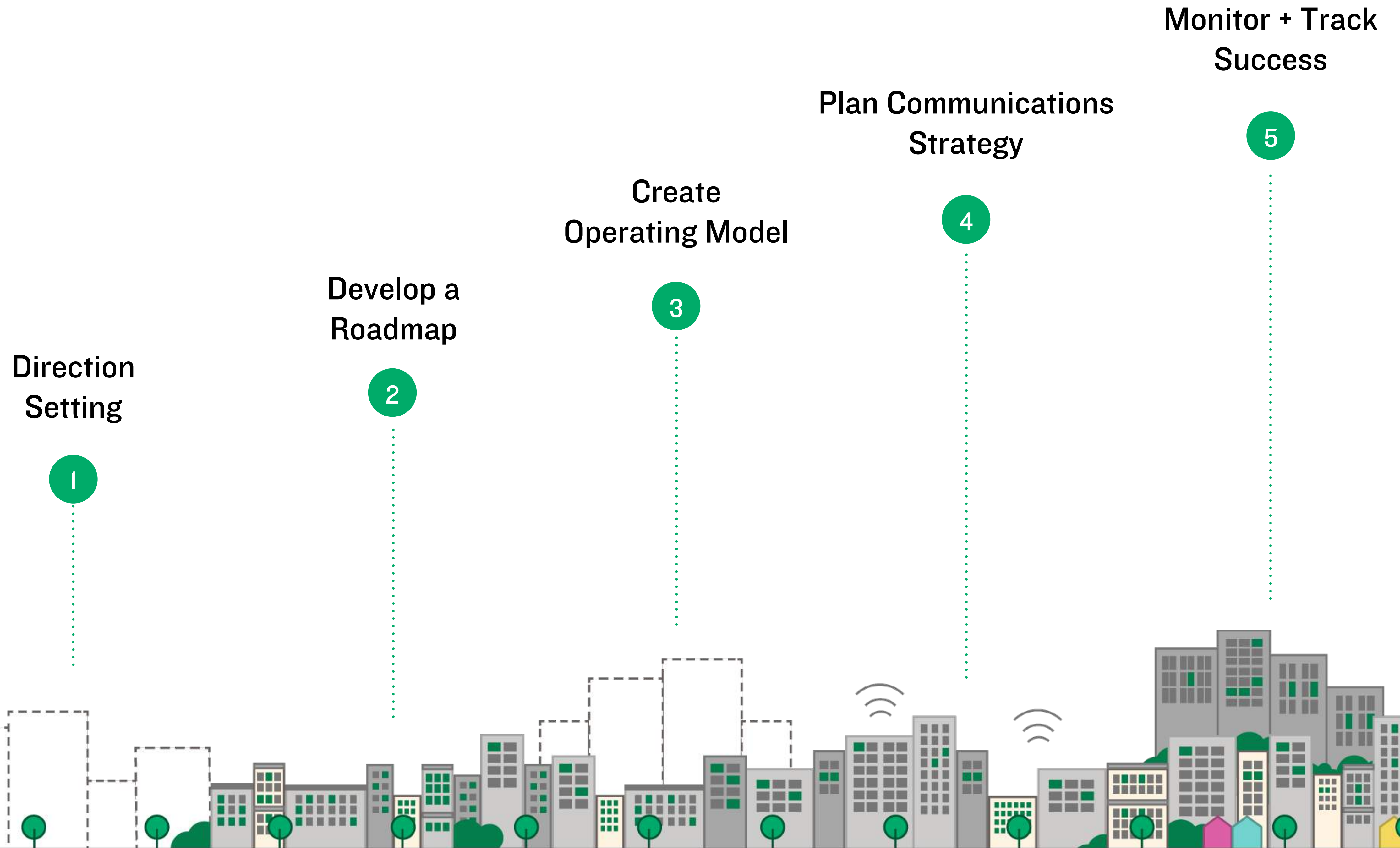
Zynga.org’s co.lab initiative pairs the drive of mission-focused edtech entrepreneurs with the passion and industry knowledge of Zynga employees to help start-ups with learning games scale their products for greater impact and long-term sustainability. By providing investment capital and office space, along with expert product advice from professional grade developers, Zynga.org is helping individual companies succeed while advancing the broader marketplace for games that improve academic and social outcomes. In addition, Zynga partners with SFUSD to teach game design and coding to San Francisco public high school students and is the lead funder of BAVC’s G:URL Game Makers summer program, which aims to inspire and develop young female game designers. Zynga also offers internships in partnership with Year Up to help underserved youth transition into tech jobs.



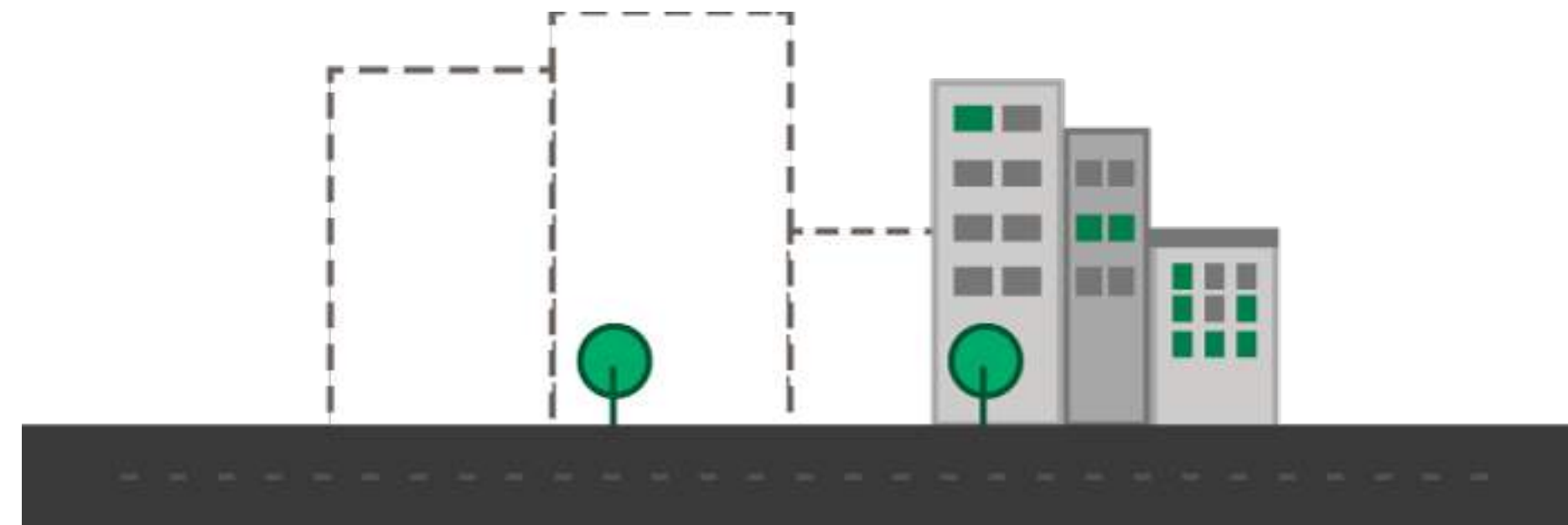
IV. MAXIMIZE YOUR IMPACT



MAXIMIZE YOUR IMPACT



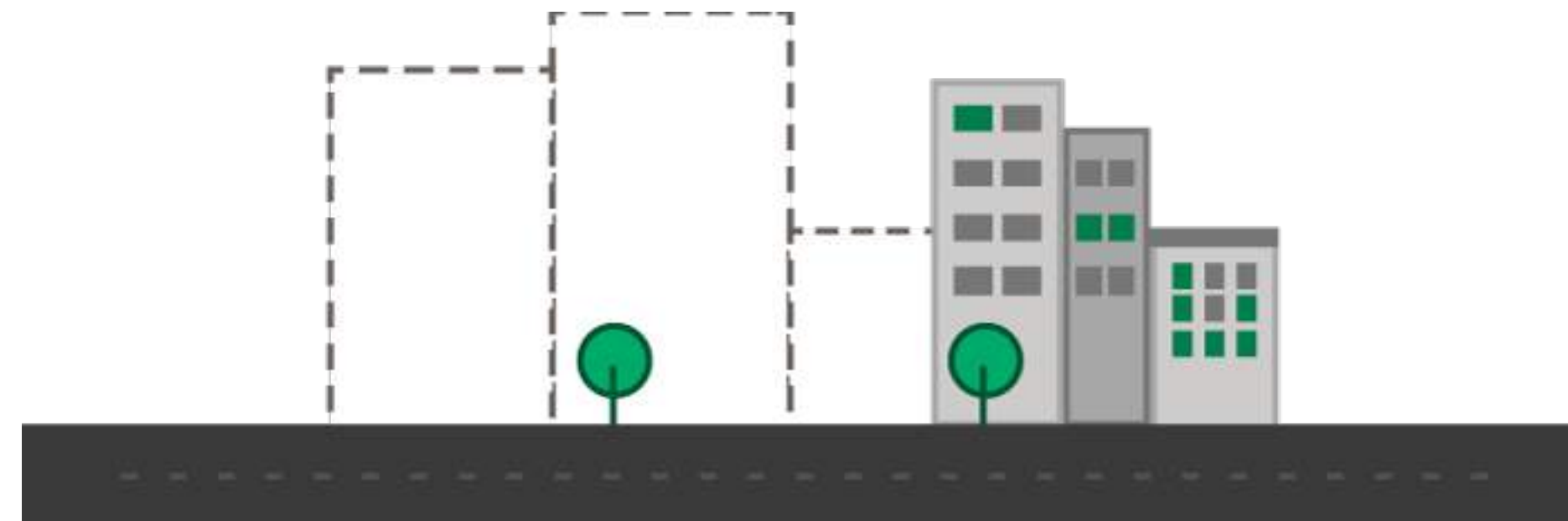
I. DIRECTION SETTING: DEFINE DESIRED IMPACT



Actions to take	How to do it
<ol style="list-style-type: none"> 1. Consider employee, business and social benefits of a giving program 2. Define the value of each benefit to your specific company 3. Prioritize which benefits are most important and most urgent 	<ul style="list-style-type: none"> • Workshop or facilitated session
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • CEO • VP of HR • VP of Strategy • VP of Marketing

Keys to success
<ul style="list-style-type: none"> • Have an honest dialogue about purpose. Motivations for corporate philanthropy need not be purely altruistic.

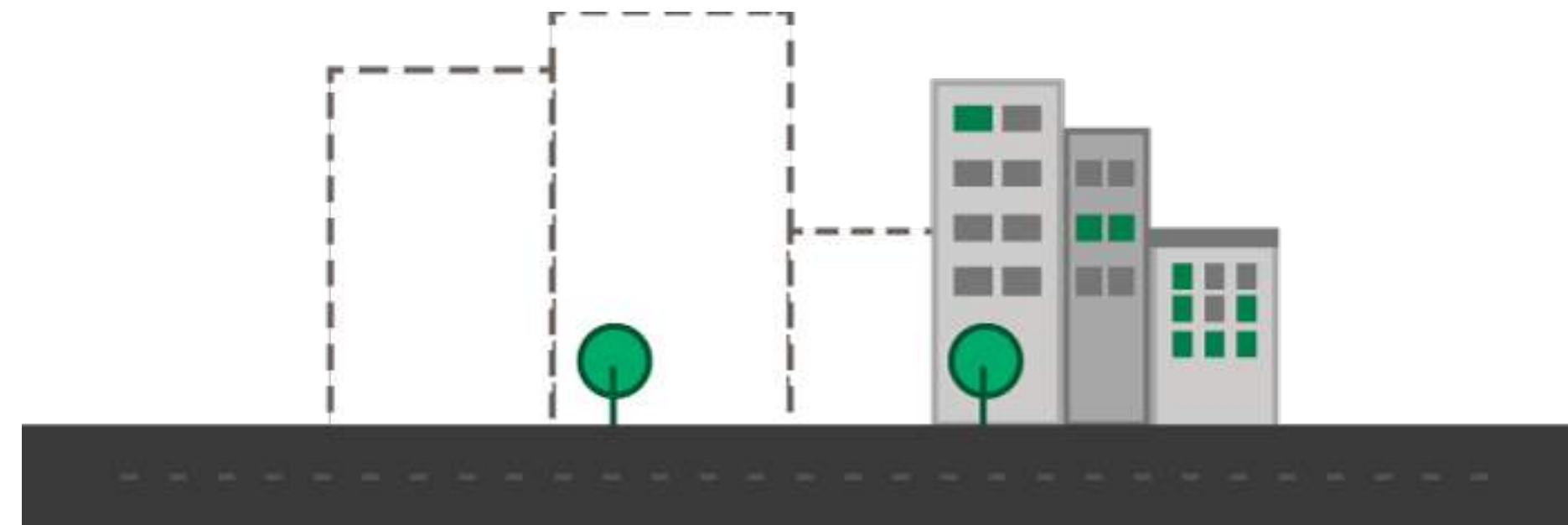
I. DIRECTION SETTING: TAKE STOCK OF CURRENT EFFORTS



Actions to take	How to do it
<ol style="list-style-type: none"> 1. Survey key stakeholders on your approach to giving 2. Evaluate the levers being used 3. Use feedback to align current efforts with philanthropic goals 	<ul style="list-style-type: none"> • Administer a broad-reaching survey • Conduct interviews with smaller focus group
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • C-level executives • VP of Finance • VP of HR • Top performers at various levels of org chart

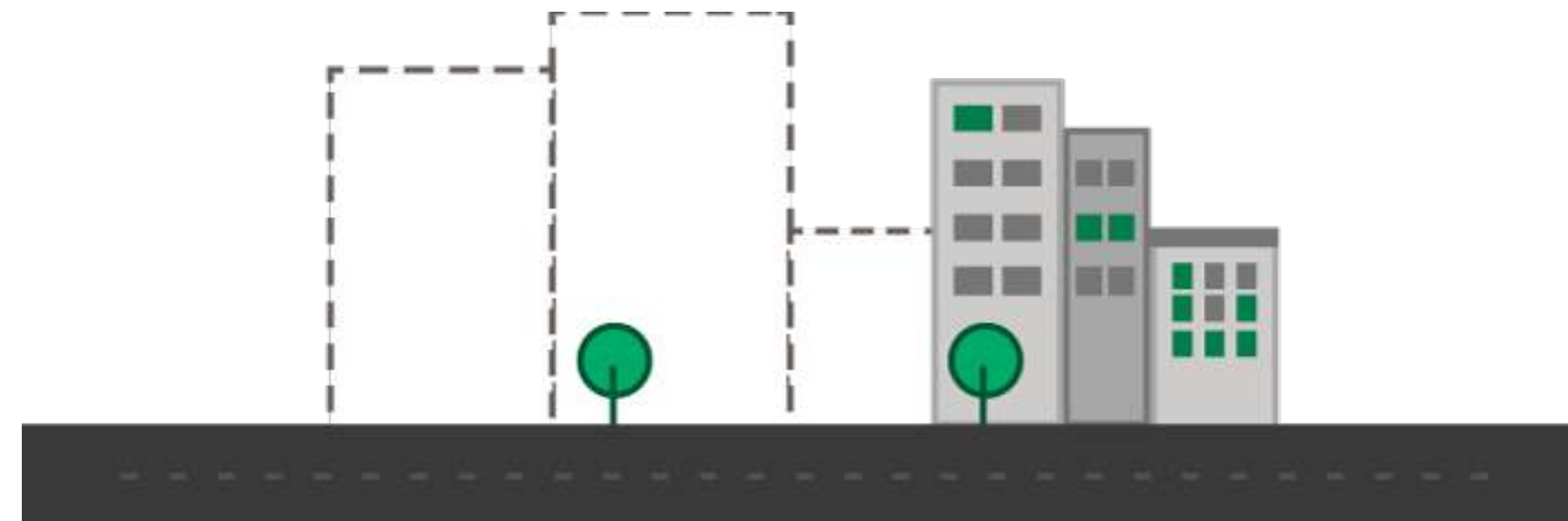
Keys to success
<ul style="list-style-type: none"> • Be comprehensive in your evaluation, but don't get stuck in the weeds. A quicker 80% inventorying is better than a time-consuming attempt at perfection.

I. DIRECTION SETTING: PRIORITIZE + FOCUS



Actions to take	How to do it		
<p>1. Rank and assess potential focus areas based on:</p> <ul style="list-style-type: none"> • Utilization of core assets • Passion for the topic in the C-suite • Strong employee interest • Potential to positively impact revenue 	<ul style="list-style-type: none"> • Conduct a workshop of select employees <tr> <th colspan="2" data-bbox="1430 1057 2473 1122">Whom to involve</th> </tr> <ul style="list-style-type: none"> • C-level executives • VP of Finance • VP of HR • Top performers at various levels of org chart 	Whom to involve	
Whom to involve			
Keys to success			
<ul style="list-style-type: none"> • Be pragmatic. Employee interest is important, but executive-level passion helps ensure resources when times are tough. 			

I. DIRECTION SETTING: IDENTIFY THE GAPS



Actions to take	How to do it
<ol style="list-style-type: none"> 1. List desired benefits in order of priority 2. Match up current efforts to full list of benefits (note: many levers will address several benefits at once) 3. Identify which high-priority benefits are under or unaddressed 	<ul style="list-style-type: none"> • Align philanthropic efforts (monetary, volunteering, products and services, and community engagements) with high-priority benefits to analyze where current efforts might be falling short
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • Project manager can perform analysis with previously gathered data

Keys to success
<ul style="list-style-type: none"> • Gut-check whether the desired benefits and current efforts were described accurately. • Know that some desired benefits might require more than one course of action (i.e., products and services and volunteering).

2. DEVELOP A ROADMAP



Actions to take	How to do it
<ol style="list-style-type: none"> 1. List current philanthropic efforts that need to change and new efforts you want to integrate to achieve your desired benefits 2. Determine new level of support required for each effort 3. Set a timeline: quick wins (0-6 mo.), medium-term projects (6-12 mo.) and long-term projects (12+ mo.) 	<ul style="list-style-type: none"> • Draft a roadmap to present to key stakeholders and solicit feedback
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • Project manager should draft roadmap and lead workshop, but buy-in is necessary from key executive stakeholders

Keys to success
<ul style="list-style-type: none"> • Be selective about which efforts are a good fit for your company. • Be honest about your capacity (both resources and time) to execute. • Don't look for unanimous consent across the organization—you can't please everyone!



3. OPERATING MODEL: DRAFT A PLAN



Actions to take	How to do it
<ol style="list-style-type: none"> 1. Assess your current giving model and internal resources <ul style="list-style-type: none"> • Structure (volunteer committee, staffed department, separate foundation) • Size (# of dedicated FTE) • Reports to (CFO, general counsel, CEO) 2. Determine what type of model will suit your desired giving strategy 3. Create a timeline and action plan to get from current to desired state 	<ul style="list-style-type: none"> • Determine decision-making body up front • Project manager can develop one or two scenarios to present to key stakeholders <div style="text-align: center; background-color: #f2f2f2; padding: 5px;">Whom to involve</div> <ul style="list-style-type: none"> • CEO • CFO • General Counsel

Keys to success
<ul style="list-style-type: none"> • Be thoughtful—avoid getting stuck in the status quo. • Lay out a sequenced plan that will transition by stage, if necessary. • Prepare for setbacks, particularly on issues of funding and creating a foundation.

3. OPERATING MODEL: IMPLEMENTATION + PARTNERSHIPS



Actions to take	How to do it
<ol style="list-style-type: none"> 1. List all philanthropic efforts going forward 2. Determine who's responsible for each effort (this can be done internally, via third party or with a hybrid approach) 3. Figure out how partners will be sourced <ul style="list-style-type: none"> • Individual search/vetting • Existing relationships • Call for proposals 	<ul style="list-style-type: none"> • Will be determined by analysis of priority efforts, internal strengths and staffing capacity
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • VP Operations • VP HR

Keys to success
<ul style="list-style-type: none"> • Resist the temptation to do everything yourself! • At early phases, many strategies are best outsourced to third-party vendors or aggregators. • Don't spread yourself too thin.

4. COMMUNICATION TACTICS: INTERNAL



Actions to take	How to do it
<ol style="list-style-type: none"> 1. Brainstorm the universe of potential internal communication efforts that might be employed 2. Assess each effort along the dimensions of reach and impact 3. Narrow down the list of potential internal communications efforts to those that best fit the capabilities and needs of your company while maximizing reach and impact 	<ul style="list-style-type: none"> • Conduct a workshop of key stakeholders and creative brainstormers
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • VP of Marketing • VP of HR

Keys to success
<ul style="list-style-type: none"> • Allow ample time and apply design thinking principles to generate as many communications tactics as possible. • Don't settle on just the obvious—be creative! • Be persistent—employees need to get pinged multiple times through multiple channels to drive real action.

4. COMMUNICATION TACTICS: EXTERNAL



Actions to take	How to do it
<ol style="list-style-type: none"> 1. List the information you want to share with the general public about your giving efforts 2. Develop strategies to make content fun and engaging, beyond reporting the facts 3. Decide which channels you will use to share information, knowing that you have more control over some channels than others 	<ul style="list-style-type: none"> • Workshop of key stakeholders
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • VP of Marketing • VP of HR

Keys to success
<ul style="list-style-type: none"> • Communicate something! Don't let the desire to appear perfect get in the way of sharing what you're doing. • Define your approach before someone else does it for you. Concerns over criticism are valid, but not communicating anything will only make the criticism worse. • External communication is an important step; do not skip it!

5. MONITORING + TRACKING



Actions to take	How to do it
<ol style="list-style-type: none"> 1. Identify the different metrics and aligned indicators you want to track to determine if your impact goals are being met 2. Develop an OKR (objectives and key results) dashboard 	<ul style="list-style-type: none"> • Determine success metrics for each philanthropic effort you choose and establish how you will obtain that information
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • A larger stakeholder group, including corporate philanthropy team if you have it, or a committee of engaged employees, if you do not

Keys to success
<ul style="list-style-type: none"> • Be willing to experiment. If you determine you cannot accurately obtain information, you can tweak metrics for the next reporting period. • Ensure the metrics you use are directly aligned to your goals. • If you use a third-party vendor, ensure they have strong tracking systems in place.



5. MONITORING + TRACKING: SURVEY EMPLOYEE PARTICIPANTS



Actions to take	How to do it
<ol style="list-style-type: none"> 1. List what you want to know about your company's giving efforts 2. Develop a set of questions that will yield key insights 3. Determine frequency of survey 	<ul style="list-style-type: none"> • Administer a survey to all company employees
	<p style="text-align: center;">Whom to involve</p> <ul style="list-style-type: none"> • All employees

Keys to success
<ul style="list-style-type: none"> • Make the survey no longer than five minutes. • Offer an incentive for completion.

GET STARTED

The Bay Area is home to many of the world's most pioneering and influential companies. At the same time, 1 in 5 people lives in poverty. Never has there been a more urgent need to give back.

The SF Gives Playbook is just the beginning. Tipping Point Community has additional tools and reference materials to support companies in building and refining their social responsibility programs. We can help your company have meaningful and lasting impact.

Contact us at mjohnson@tippingpoint.org



DEVELOPED IN PARTNERSHIP WITH SF GIVES FOUNDING COMPANIES



JAWBONE



Google



box



LEVI STRAUSS & CO.



SVAngel



POPSUGAR



Lookout

RPX
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